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ABSTRACT

The duties and tasks found in these task lists form the basis of instructional content for secondary, postsecondary, and adult occupational training programs for business, marketing, and management occupations. The business, marketing, and management occupations are divided into eight clusters. The clusters and occupations are: accounting-bookkeeping cluster (bookkeeper, bookkeeper-machine operator, payroll clerk, payroll clerk--data processing, accounting clerk, accounting clerk--data processing), computer operation and programming cluster (terminal operator, computer operator), information processing cluster (word processor, information specialist, accounting clerk--data processing, terminal operator, payroll clerk--data processing), secretarial cluster (stenographer, secretary, legal secretary, medical secretary), general office clerk cluster (receptionist, typist), product-oriented marketing cluster (sales clerk, salesperson, stock clerk--self-service store, cashier, cashier/checker), service-oriented cluster (teller), and business ownership/management cluster (small business owner/operator). Matrices for each cluster list the duties and tasks and indicate which occupations include that duty or task. Each cluster also includes a list of employability skills that are important for all occupations. (YLB)

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Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

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BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

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Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

ACCOUNTING-BOOKKEEPING CLUSTER

Bookkeeper

Bookkeeper-Machine Operator

Payroll Clerk

Payroll Clerk, Data Processing

Accounting Clerk

Accounting Clerk, Data Processing

*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

BK = Bookkeeper
BM = Bookkeeper - Machine Operator
PC = Payroll Clerk
PD = Payroll Clerk, Data Processing
AC = Accounting Clerk
AD = Accounting Clerk, Data Processing

RECORDING ENTRIES IN JOURNALS AND LEDGERS

	BK	BM	PC	PD	AC	AD
1 Record accounting entries for cash payments using manual bookkeeping system	X				X	
2 Record accounting entries to adjust an account using manual bookkeeping system	X				X	
3 Record accounting entries for buying merchandise on account using manual bookkeeping system	X				X	
4 Record accounting entries using peg board	X				X	
5 Record accounting entries in a combination journal using manual bookkeeping system	X				X	
6 Record accounting entries pertaining to notes and interest using manual bookkeeping system	X				X	
7 Record payroll tax accounting entries using manual bookkeeping system	X				X	
8 Record cash receipts accounting entries using manual bookkeeping system	X				X	
9 Record sales tax accounting entries using manual bookkeeping system	X				X	
10 Record accounting entries pertaining to accrued interest income using manual bookkeeping system	X				X	
11 Record accounting entries pertaining to accrued interest expense using manual bookkeeping system	X				X	
12 Post to ledger account from journals using manual bookkeeping system	X				X	
13 Record accounting entries pertaining to corporation income tax using manual bookkeeping system	X				X	
14 Post directly to ledger from source document using manual bookkeeping system	X				X	
15 Post from cash journals using manual bookkeeping system	X				X	
16 Record accounting entries for selling merchandise on account using manual bookkeeping system	X				X	
17 Record accounting entries pertaining to payroll using manual bookkeeping system	X				X	
18 Correct errors indicated by trial balance	X				X	
19 Write receipts for checks and cash sales	X				X	
20 Record entries for cash payments using bookkeeping machine		X				
21 Record accounting entries to adjust accounts using bookkeeping machine		X				
22 Record accounting entries for buying merchandise on account using bookkeeping machine		X				
23 Record accounting entries in a combination journal using bookkeeping machine		X				
24 Record accounting entries pertaining to notes and interest using bookkeeping machine		X				
25 Record accounting entries pertaining to payroll tax using bookkeeping machine		X				

	BK	BM	PC	PD	AC	AD
26 Record accounting entries pertaining to cash receipts using bookkeeping or billing machine		X				
27 Record accounting entries pertaining to sales tax using bookkeeping machine		X				
28 Record accounting entries pertaining to accrued interest income using bookkeeping machine		X				
29 Post to ledger account from journals using bookkeeping machine		X				
30 Record accounting entries pertaining to corporation income tax using bookkeeping machine		X				
31 Post directly to ledger from source documents using bookkeeping machine		X				
32 Post from cash journals using bookkeeping machine		X				
33 Record accounting entries for selling merchandise on account using bookkeeping or billing machine		X				
34 Record accounting entries pertaining to payroll using bookkeeping machine		X				
35 Correct errors indicated by trial balance using bookkeeping machine		X				
36 Record accounting entries pertaining to accrued interest expense using bookkeeping machine		X				
37 Input accounting entries for buying merchandise on account using computer system						X
38 Input accounting entries for cash payment using computer system						X
39 Input accounting entries for selling merchandise on account using computer system						X
40 Input accounting entries pertaining to cash receipts using computer system						X
41 Post from cash journals using computer system						X
42 Input accounting entries pertaining to sales tax using computer system						X
43 Input accounting entries in a combination journal using computer system						X
44 Input accounting entries pertaining to notes and interest using computer system						X
45 Input accounting entries pertaining to accrued interest income using computer system						X
46 Input accounting entries pertaining to accrued interest expense using computer system						X
47 Input accounting entries pertaining to payroll using computer system						X
48 Input accounting entries pertaining to payroll tax using computer system						X
49 Input accounting entries pertaining to corporation income tax using computer system						X
50 Input accounting entries to adjust account using computer system						X
51 Post directly to ledger from source documents using computer system						X
52 Post to ledger account from journals using computer system						X
53 Input corrections for errors indicated by trial balance using computer system						X

ACCOMPLISHING PAYROLL ACTIVITIES

		BK	BM	PC	PD	AC	AD
1	Prepare payroll using manual payroll system	X		X			
2	Process salary adjustments manually	X		X		X	
3	Prepare individual employee's earnings record manually	X		X		X	
4	Prepare salesperson's commission statements manually	X		X		X	
5	Prepare payroll statements manually	X		X			
6	Prepare employee's form W-2 manually	X		X			
7	Prepare employer's quarterly federal tax returns manually (form 941)	X		X			
8	Prepare federal tax deposits	X	X	X			
9	Prepare employer's quarterly state tax returns manually	X		X			
10	Prepare state tax deposits	X	X	X			
11	Prepare employer's annual reconciliation reports of income tax withheld manually (form W-3)	X		X			
12	Prepare employer's federal unemployment tax report manually (form 940)	X		X			
13	Prepare state unemployment tax report manually	X		X			
14	Prepare FICA tax reports manually	X		X			
15	Distribute payroll checks			X	X		
16	Input data to process payroll using computer system				X		
17	Input data to prepare individual employee's earnings record using computer system				X		
18	Input data to make salary adjustments using computer system				X		
19	Input data to prepare salesperson's commission statements using computer system				X		
20	Input data to prepare payroll statements using computer system				X		
21	Prepare employee's form W-2 using computer system				X		
22	Prepare employee's quarterly federal tax returns using computer system (form 941)				X		
23	Prepare employer's quarterly state tax returns using computer system				X		
24	Prepare employer's annual reconciliation reports of income tax withheld using computer system (form W-3)				X		
25	Prepare employer's annual federal unemployment tax report using computer system (form 940)				X		
26	Prepare state unemployment tax return using computer system				X		
27	Prepare FICA tax reports using computer system				X		
28	Prepare payroll using bookkeeping machine		X				
29	Prepare individual employee's earnings record using bookkeeping machine		X				
30	Prepare salesperson's commission statements		X				
31	Prepare payroll statements using bookkeeping machine		X				
32	Prepare employee's form W-2 using bookkeeping machine		X				
33	Prepare employer's quarterly federal tax returns using bookkeeping machine (form 941)		X				
34	Prepare employer's quarterly state tax returns using bookkeeping machine		X				

	BK	BM	PC	PD	AC	AD
35 Prepare employer's annual reconciliation reports of income tax withheld using bookkeeping machine (form W-3)		X				
36 Prepare state unemployment tax report using bookkeeping machine		X				
37 Prepare employers annual federal unemployment tax report using bookkeeping machine (form 940)		X				
38 Process salary adjustments using bookkeeping machine		X				
39 Prepare FICA tax reports using bookkeeping machine		X				
40 Prepare payroll to be processed on computer system	X		X	X		
41 Post payroll deductions using manual bookkeeping system					X	

PERFORMING CLERICAL ACTIVITIES

	BK	BM	PC	PD	AC	AD
1 Duplicate materials using photocopying machine	X	X	X	X	X	X
2 Process outgoing mail	X	X	X	X	X	X
3 Process incoming mail	X	X	X	X	X	X
4 Set up new files	X	X	X	X	X	X
5 File materials using alphabetic filing system	X	X	X	X	X	X
6 File materials using numeric filing system	X	X	X	X	X	X
7 File materials using subject filing system	X	X	X	X	X	X
8 Verify calculations on source documents using a calculator	X	X			X	
9 Process incoming telephone calls	X	X	X	X	X	X
10 Process outgoing telephone calls	X	X	X	X	X	X
11 Record outgoing long distance telephone calls	X	X	X	X	X	X
12 Clean and straighten up work area	X	X	X	X	X	X
13 Equip work station with office supplies and office forms	X	X	X	X	X	X
14 Prepare shipment for freight express	X	X				
15 Type business letters from rough draft	X	X				
16 Type tabulated materials	X	X				
17 Maintain accounting procedures manual	X	X				
18 Manage office supplies	X	X				
19 Verify calculations on source documents using computer system						X
20 Maintain payroll processing procedures manual			X	X		
21 Perform data protection procedures during power failure				X		X
22 Perform power conservation and data protection procedures during air conditioning failure				X		X
23 Follow procedures to maintain confidentiality of data				X		X
24 Maintain system access security				X		X
25 Prioritize work	X	X	X	X	X	X

MAINTAINING OFFICE EQUIPMENT

	BK	BM	PC	PD	AC	AD
1 Change ribbon on bookkeeping machine		X				
2 Clean bookkeeping machine		X				
3 Change paper in bookkeeping machine		X				
4 Repair minor equipment malfunctions on bookkeeping machine		X				
5 Recommend service on bookkeeping machine		X				

		BK	BM	PC	PD	AC	AD
6	Change ribbon on printer				X		X
7	Perform maintenance functions on photocopier such as changing toner and replacing paper	X	X	X	X	X	X
8	Repair minor equipment malfunctions				X		
9	Recommend service on equipment				X		
10	Loan/change paper in printer				X		X
11	Repair minor equipment malfunctions	X		X		X	X
12	Recommend service on equipment	X		X		X	X
13	Change ribbons on calculators			X			
14	Change paper tapes on calculators or adding machines	X		X		X	
15	Clean calculators			X			
16	Change office equipment ribbons	X				X	
17	Clean equipment	X			X	X	X
18	Replace paper and ribbons on office machines	X	X			X	
19	Report equipment malfunctions to supervisor				X		
20	Record operating and down time				X		

PROCESSING EMPLOYEE BENEFITS

		BK	BM	PC	PD	AC	AD
1	Complete individual record of employment			X			
2	Process employee pension plan documents			X			
3	Process employee dental insurance documents			X			
4	Process employee health insurance documents			X			
5	Process employee life insurance documents			X			
6	Process documents relating to employee sick leave			X			
7	Process documents relating to employee vacation leave			X			
8	Process documents relating to employee disability leave			X			
9	Process documents relating to employee leave of absence such as jury duty or military leave			X			
10	Process documents relating to employees savings plans			X			
11	Process documents relating to employee credit unions			X			
12	Prepare benefit termination forms			X			
13	Prepare worker's compensation forms			X			
14	Input data to complete individual record of employment				X		
15	Input data relating to employee pension plan				X		
16	Input data relating to employee dental insurance				X		
17	Input data relating to employee health insurance				X		
18	Input data relating to employee life insurance				X		
19	Input data relating to employee sick leave				X		
20	Input data relating to employee vacation leave				X		
21	Input data relating to employee disability leave				X		
22	Input data relating to employee leave of absence such as jury duty or military leave				X		
23	Input data relating to employee savings plan				X		
24	Input data relating to employee credit union				X		
25	Input data to prepare benefit termination forms				X		
26	Input data relating to worker's compensation forms				X		

MAINTAINING EMPLOYEE PAYROLL RECORDS

	BK	BM	PC	PD	AC	AD
1 Input data for new employee record in master employee file using computer system				X		
2 Input data to change employee record in master employee file				X		
3 Input data to remove employee record from master employee file				X		
4 Input data to keep record of daily attendance of employees				X		
5 Enter data for new employee in master employees' file manually			X			
6 Process changes to employee records manually			X			
7 Remove employee record from master file manually			X			
8 Keep record of daily attendance of employees			X			

ACCOMPLISHING GENERAL ACCOUNTING/BANKING RELATED ACTIVITIES

	BK	BM	PC	PD	AC	AD
1 Process cash sale using cash register	X	X				
2 Process cash received on account using cash register	X	X				
3 Process charge sale using cash register	X	X				
4 Process sales return using cash register	X	X				
5 Process cash payment on account using cash register	X	X				
6 Process accounts payable invoices using bookkeeping machine		X				
7 Record discounts allowable on invoices using bookkeeping machine		X				
8 Fill out purchase order invoices	X	X			X	
9 Record daily sales on unit control forms	X	X			X	
10 Prepare credit memos for goods returned	X	X			X	
11 Prepare bill of sale	X	X			X	
12 Prepare accounting data for computer processing	X				X	
13 Process accounts payable invoices in manual bookkeeping system	X				X	
14 Prepare reconciliation correction sheets for changes to computer generated reports	X				X	
15 Record discounts allowable on invoices	X	X			X	
16 Reconcile bank statements using calculator	X	X			X	
17 Make bank deposits	X	X				
18 Maintain petty cash fund	X	X				
19 Process checks	X	X				
20 Process returned checks	X	X			X	

ACCOMPLISHING PERIODIC ACCOUNTING/REPORTING ACTIVITIES

	BK	BM	PC	PD	AC	AD
1 Open bookkeeping system on new business using bookkeeping machine		X				
2 Foot, prove and rule cash journals on bookkeeping machine		X				
3 Prepare post-closing trial balance using bookkeeping machine		X				
4 Prepare income statement using bookkeeping machine		X				
5 Prepare capital statement using bookkeeping machine		X				
6 Prepare balance sheet using bookkeeping machine		X				
7 Prepare schedule of accounts payable using bookkeeping machine		X				

		BK	BM	PC	PD	AC	AD
8	Prepare schedule of accounts receivable using bookkeeping machine		X				
9	Prepare schedule of cost of goods sold using bookkeeping machine		X				
10	Prepare customer's statement of accounts using bookkeeping machine		X				
11	Prepare invoices for payment due using bookkeeping machine		X				
12	Prepare cash disbursement sheets using bookkeeping machine		X				
13	Prepare checks to pay bills for business using bookkeeping machine		X				
14	Record closing journal entries using bookkeeping machine		X				
15	Prepare worksheet using bookkeeping machine		X				
16	Record opening entries for new business using a manual bookkeeping machine	X				X	
17	Foot, prove and rule cash journals	X				X	
18	Prepare post-closing trial balance using a calculator	X				X	
19	Prepare income statement using calculator	X				X	
20	Prepare capital statements using calculator	X				X	
21	Prepare balance sheet using calculator	X				X	
22	Prepare schedule of accounts payable using calculator	X				X	
23	Prepare schedule of accounts receivable using calculator	X				X	
24	Prepare schedule of cost of goods sold using calculator	X				X	
25	Prepare customer's statement of accounts	X				X	
26	Prepare invoices for payments due	X				X	
27	Prepare cash disbursements sheets	X					
28	Take inventory	X	X			X	
29	Write checks to pay bills for business	X				X	
30	Record closing journal entries using manual bookkeeping system	X				X	
31	Prepare worksheet using manual bookkeeping system	X					
32	Input accounting entries to open bookkeeping system for new business using computer system						X
33	Input closing journal entries using computer system						X
34	Foot and prove cash journals on computer system						X
35	Print worksheet using a computer system						X
36	Print post-closing trial balance using computer system						X
37	Print income statement using computer system						X
38	Print capital statement using computer system						X
39	Print balance sheet using computer system						X
40	Print schedule of accounts payable using computer system						X
41	Print schedule of accounts receivable using computer system						X
42	Print schedule of cost of goods sold using computer system						X
43	Print invoices for payments due using computer system						X
44	Print customer's statement of accounts using computer system						X

45 Print cash disbursement reports using comp
46 Print checks to pay bills for business usi
system
47 Type periodic reports and statements

OOKKEEPING CLUSTER MATRIX

	BK	BM	PC	PD	AC	AD
using computer system						X
usiness using computer						X
ments					X	

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Record accounting entries for cash payments using manual bookkeeping systems
2 Record accounting entries to adjust account using manual bookkeeping system
3 Record accounting entries for buying merchandise on account using manual bookkeeping system
4 Record accounting entries using peg board
5 Record accounting entries in combination journal using manual bookkeeping system
6 Record accounting entries pertaining to notes and interest using manual bookkeeping system
7 Record payroll tax accounting entries using manual bookkeeping system
8 Record cash receipts accounting entries using manual bookkeeping system
9 Record sales tax accounting entries using manual bookkeeping system
10 Record accounting entries pertaining to accrued interest income using manual bookkeeping system
11 Record accounting entries pertaining to accrued interest expense using manual bookkeeping system
12 Post to ledger account from journals using manual bookkeeping system
13 Record accounting entries pertaining to corporation income tax using manual bookkeeping system
14 Post directly to ledger from source document using manual bookkeeping system
15 Post from cash journals using manual bookkeeping system
16 Record accounting entries for selling merchandise on account using manual bookkeeping system
17 Record accounting entries pertaining to payroll using manual bookkeeping system
18 Correct errors indicated by trial balance
19 Write receipts for checks and cash sales

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1 Record opening entries for new business using manual bookkeeping system
2 Foot, prove, and rule cash journals
3 Prepare post-closing trial balance using calculator
4 Prepare income statement using calculator
5 Prepare capital statements using calculator
6 Prepare balance sheet using calculator
7 Prepare schedule of accounts payable using calculator
8 Prepare schedule of accounts receivable using calculator
9 Prepare schedule of cost of goods sold using calculator
10 Prepare customer's statement of accounts
11 Prepare invoices for payments due
12 Prepare cash disbursements sheets
13 Take inventory
14 Write checks to pay bills for business

15 Record closing journal entries using manual bookkeeping system
16 Prepare worksheet using manual bookkeeping system

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1 Process cash sale using cash register
2 Process cash received on account using cash register
3 Process charge sale using cash register
4 Process sales return using cash register
5 Process cash payment on account using cash register
6 Prepare accounting data for computer processing
7 Process accounts payable invoices in manual bookkeeping system
8 Prepare reconciliation correction sheets for changes to computer generated reports
9 Record discounts allowable on invoices
10 Record daily sales on unit control forms
11 Prepare credit memos for goods returned
12 Fill out purchase order invoices
13 Prepare bill of sale
14 Reconcile bank statements using calculator
15 Make bank deposits
16 Maintain petty cash fund
17 Process checks
18 Process returned checks

DUTY D: Accomplishing Payroll Activities

TASKS:
1 Prepare payroll using manual payroll system
2 Prepare payroll to be processed on computer system
3 Prepare individual employee's earnings record manually
4 Prepare salesperson's commission statements manually
5 Prepare payroll statements manually
6 Prepare employee's form W-2 manually
7 Prepare federal tax deposits
8 Prepare employer's quarterly state tax returns manually
9 Prepare state tax deposits
10 Prepare employer's annual reconciliation reports of income tax withheld manually (form W-3)
11 Prepare state unemployment tax report manually
12 Prepare employer's federal unemployment tax report manually (form 940)
13 Process salary adjustments manually
14 Prepare FICA tax reports manually
15 Prepare employer's quarterly federal tax returns manually (form 941)

DUTY E: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean office equipment

3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Change paper tapes on calculators or adding machines
5 Repair office equipment malfunctions
6 Recommend service on equipment
7 Replace paper and ribbons on office machines

DUTY F: Performing Clerical Activities

TASKS:
1 Duplicate materials using photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Prepare shipment for freight express
5 Set up new files
6 File materials using alphabetic filing system
7 File materials using numeric filing system
8 File materials using subject filing system
9 Type business letters from rough draft
10 Type tabulated materials
11 Maintain accounting procedures manual
12 Manage office supplies
13 Equip work station with office supplies and office forms
14 Verify calculations on source documents using a calculator
15 Process incoming telephone calls
16 Process outgoing telephone calls
17 Clean and straighten up work area
18 Record outgoing long distance telephone calls
19 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

BOOKKEEPER - MACHINE OPERATOR

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Record accounting entries for cash payments using bookkeeping machine
2 Record accounting entries to adjust accounts using bookkeeping machine
3 Record accounting entries for buying merchandise on account using bookkeeping machine
4 Record accounting entries in a combination journal using bookkeeping machine
5 Record accounting entries pertaining to notes and interest using bookkeeping machine
6 Record accounting entries pertaining to payroll tax using bookkeeping machine
7 Record accounting entries pertaining to cash receipts using bookkeeping or billing machine
8 Record accounting entries pertaining to sales tax using bookkeeping machine
9 Record accounting entries pertaining to accrued interest income using bookkeeping machine
10 Post to ledger account from journals using bookkeeping machine
11 Record accounting entries pertaining to corporation income tax using bookkeeping machine
12 Post directly to ledger from source documents using bookkeeping machine
13 Post from cash journals using bookkeeping machine
14 Record accounting entries for selling merchandise on account using bookkeeping or billing machine
15 Record accounting entries pertaining to payroll using bookkeepinq machine
16 Correct errors indicated by trial balance using bookkeeping machine
17 Record accounting entries pertaining to accrued interest expense using bookkeeping machine

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

1 Open bookkeeping system on new business using bookkeeping machine
2 Foot, prove and rule cash journals on bookkeeping machine
3 Prepare post-closing trial balance using bookkeeping machine
4 Prepare income statement using bookkeeping machine
5 Prepare capital statement using bookkeeping machine
6 Prepare balance sheet using bookkeeping machine
7 Prepare schedule of accounts payable using bookkeeping machine
8 Prepare schedule of accounts receivable using bookkeeping machine
9 Prepare schedule of cost of goods sold using bookkeeping machine
10 Prepare customer's statement of accounts using bookkeeping machine
11 Prepare invoices for payment due using bookkeeping machine

12 Prepare cash disbursement sheets using bookkeeping machine
13 Prepare checks to pay bills for business using bookkeeping machine
14 Record closing journal entries using bookkeeping machine
15 Prepare worksheet using bookkeeping machine
16 Take inventory

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1 Process cash sale using cash register
2 Process cash received on account using cash register
3 Process charge sale using cash register
4 Process sales return using cash register
5 Process cash payment on account using cash register
6 Process accounts payable invoices using bookkeeping machine
7 Record discounts allowable on invoices using bookkeeping machine
8 Fill out purchase order invoices
9 Record daily sales on unit control form
10 Prepare credit memos for goods returned
11 Prepare bill of sale
12 Record discounts allowable on invoices
13 Reconcile bank statements using calculator
14 Make bank deposits
15 Maintain petty cash fund
16 Process checks
17 Process returned checks

DUTY D: Accomplishing Payroll Activities

TASKS:
1 Prepare payroll using bookkeeping machine
2 Prepare individual employee's earnings record using bookkeeping machine
3 Prepare salesperson's commission statements
4 Prepare payroll statements using bookkeeping machine
5 Prepare employee's form W-2 using bookkeeping machine
6 Prepare employer's quarterly federal tax returns using bookkeeping machine (form 941)
7 Prepare federal tax deposits
8 Prepare employer's quarterly state tax returns using bookkeeping machine
9 Prepare state tax deposits
10 Prepare employer's annual reconciliation reports of income tax withheld using bookkeeping machine (form W-3)
11 Prepare state unemployment tax report using bookkeeping machine
12 Prepare employer's annual federal unemployment tax report using bookkeeping machine (form 940)
13 Process salary adjustments using bookkeeping machine
14 Prepare FICA tax reports using bookkeeping machine

DUTY E: Maintaining Office Equipment

TASKS:
1 Change ribbon on bookkeeping machine
2 Clean bookkeeping machine
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Change paper in bookkeeping machine
5 Repair minor equipment malfunctions on bookkeeping machine
6 Recommend service on bookkeeping machine
7 Replace paper and ribbon on office machines

DUTY F: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Type business letters from rough draft
9 Type tabulated material
10 Maintain accounting procedures manual
11 Manage office supplies
12 Verify calculations on source documents using calculator
13 Process incoming telephone calls
14 Process outgoing telephone calls
15 Equip work station with office supplies and office forms
16 Clean and straighten up work area
17 Prepare shipment for freight express
18 Record outgoing long distance telephone calls
19 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Processing Employee Benefits

TASKS:
1 Complete individual record of employment
2 Process employee pension plan documents
3 Process employee dental insurance documents
4 Process employee health insurance documents
5 Process employee life insurance documents
6 Process documents relating to employee sick leave
7 Process documents relating to employee vacation leave
8 Process documents relating to employee disability leave
9 Process documents relating to employee leave of absence such as jury duty or military leave
10 Process documents relating to employees savings plans
11 Process documents relating to employee credit unions
12 Prepare worker's compensation forms
13 Prepare benefit termination forms

DUTY B: Maintaining Employee Payroll Records

TASKS:
1 Enter data for new employee in master employees' file manually
2 Process changes to employee records manually
3 Remove employee record from master file manually
4 Keep record of daily attendance of employees

DUTY C: Accomplishing Payroll Activities

TASKS:
1 Prepare payroll using manual payroll system
2 Process salary adjustments manually
3 Prepare individual employee's earnings record manually
4 Prepare salesperson's commission statements manually
5 Prepare payroll statements manually
6 Prepare employee's form W-2 manually
7 Prepare employer's quarterly federal tax returns manually (form 941)
8 Prepare federal tax deposits
9 Prepare employer's quarterly state tax returns manually
10 Prepare state tax deposits
11 Prepare employer's annual reconciliation reports of income tax withheld manually (form W-3)
12 Prepare employer's federal unemployment tax report manually (form 940)
13 Prepare state unemployment tax report manually
14 Prepare FICA tax reports manually
15 Distribute payroll checks
16 Prepare payroll to be processed on computer system

DUTY D: Maintaining Office Equipment

TASKS:
1 Change ribbons on calculators
2 Change paper tapes on calculators or adding machines
3 Clean calculators
4 Perform maintenance functions on photocopier such as

changing toner and replacing paper
5 Repair minor equipment malfunctions
6 Recommend service on equipment

DUTY E: Performing Clerical Activities

TASKS: 1 Duplicate materials on photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Maintain payroll processing procedures manual
9 Equip work station with office supplies and office forms
10 Process incoming telephone calls
11 Process outgoing telephone calls
12 Clean and straighten up work area
13 Record outgoing long distance telephone calls
14 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Processing Employee Benefits

TASKS:
1 Input data to complete individual record of employment
2 Input data relating to employee pension plan
3 Input data relating to employee dental insurance
4 Input data relating to employee health insurance
5 Input data relating to employee life insurance
6 Input data relating to employee sick leave
7 Input data relating to employee vacation leave
8 Input data relating to employee disability leave
9 Input data relating to employee leave of absence such as jury duty or military leave
10 Input data relating to employee savings plan
11 Input data relating to employee credit union
12 Input data to prepare benefit termination forms
13 Input data relating to worker's compensation forms

DUTY B: Maintaining Employee Payroll Records

TASKS:
1 Input data for new employee record in master employee file using computer system
2 Input data to change employee record in master employee file
3 Input data to remove employee record from master employee file
4 Input data to keep record of daily attendance of employees

DUTY C: Accomplishing Payroll Activities

TASKS:
1 Input data to process payroll using computer system
2 Input data to prepare individual employee's earnings record using computer system
3 Input data to make salary adjustments using computer system
4 Input data to prepare salesperson's commission statements using computer system
5 Input data to prepare payroll statements using computer system
6 Prepare employee's form W-2 using computer system
7 Prepare employee's quarterly federal tax returns using computer system (form 941)
8 Prepare employer's quarterly state tax returns using computer system
9 Prepare employer's annual reconciliation reports of income tax withheld using computer system (form W-3)
10 Prepare employer's annual federal unemployment tax report using computer system (form 940)
11 Prepare state unemployment tax return using computer system
12 Prepare FICA tax reports using computer system
13 Distribute payroll checks
14 Prepare payroll to be processed on computer system

DUTY D: Maintaining Office Equipment

TASKS:
1 Change ribbon on printer
2 Recommend service on equipment
3 Load/change paper in printer
4 Clean equipment
5 Repair minor equipment malfunctions
6 Perform maintenance functions on photocopier such as changing toner and replacing paper
7 Report equipment malfunction to supervisor
8 Record operating and down time

DUTY E: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Maintain payroll processing procedures manual
9 Equip work station with supplies and forms
10 Process incoming telephone calls
11 Process outgoing telephone calls
12 Clean and straighten up work area
13 Record outgoing long distance telephone calls
14 Perform data protection procedures during power failure
15 Perform power conservation and data protection procedures during air conditioning failure
16 Follow procedures to maintain confidentiality of data
17 Maintain system access security
18 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

ACCOUNTING CLERK

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Record accounting entries for buying merchandise on account using manual bookkeeping system
2 Record accounting entries for cash payments using manual bookkeeping system
3 Record accounting entries for selling merchandise on account using manual bookkeeping system
4 Record cash receipts accounting entries using manual bookkeeping system
5 Post from cash journals using manual bookkeeping system
6 Record sales tax accounting entries using manual bookkeeping system
7 Record accounting entries using peg board
8 Record accounting entries in a combination journal using manual bookkeeping system
9 Record accounting entries pertaining to notes and interest using manual bookkeeping system
10 Record accounting entries pertaining to accrued interest income using manual bookkeeping system
11 Record accounting entries pertaining to accrued interest expense using manual bookkeeping system
12 Record accounting entries pertaining to payroll using manual bookkeeping system
13 Record payroll tax accounting entries using manual bookkeeping system
14 Record accounting entries pertaining to corporation income tax using manual bookkeeping system
15 Record accounting entries to adjust an account using a manual bookkeeping system
16 Post directly to ledger from source document using manual bookkeeping system
17 Post to ledger account from journals using manual bookkeeping system
18 Correct errors indicated by trial balance
19 Write receipts for checks and cash sales

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1 Record opening entries for new business using manual bookkeeping system
2 Foot, prove and rule cash journals
3 Record closing journal entries using manual bookkeeping system
4 Prepare customer's statement of accounts
5 Prepare invoices for payments due
6 Take inventory
7 Type periodic reports and statements
8 Write checks to pay bills for business
9 Prepare post-closing trial balance using a calculator
10 Prepare income statement using calculator
11 Prepare capital statements using calculator
12 Prepare balance sheet using calculator
13 Prepare schedule of accounts payable using calculator
14 Prepare schedule of accounts receivable using calculator

15 Prepare schedule of cost of goods sold using calculator

DUTY C: Accomplishing General Accounting/Banking Related Activities

TASKS:
1 Process accounts payable invoices in manual bookkeeping system
2 Record discounts allowable on invoices
3 Record daily sales on unit control forms
4 Prepare credit memos for goods returned
5 Reconcile bank statements using calculator
6 Process returned checks
7 Fill out purchase order invoices
8 Prepare bill of sale
9 Prepare accounting data for computer processing
10 Prepare reconciliation correction sheets for changes to computer generated reports

DUTY D: Accomplishing Payroll Activities

TASKS:
1 Post payroll deductions using manual bookkeeping system
2 Prepare individual employee's earnings record manually
3 Prepare salesperson's commission statements manually
4 Process salary adjustments manually

DUTY E: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Change paper tapes on calculators or adding machines
5 Repair minor office equipment malfunctions
6 Recommend service on equipment
7 Replace paper and ribbons on office machines

DUTY F: Performing Clerical Activities

TASKS:
1 Duplicate materials using photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Verify calculations on source documents using calculator
9 Process incoming telephone calls
10 Process outgoing telephone calls
11 Clean and straighten up work area
12 Equip work station with office supplies and office forms
13 Record outgoing long distance telephone calls
14 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Input accounting entries for buying merchandise on account using computer system
2 Input accounting entries for cash payment using computer system
3 Input accounting entries for selling merchandise on account using computer system
4 Input accounting entries pertaining to cash receipts using computer system
5 Post from cash journals using computer system
6 Input accounting entries pertaining to sales tax using computer system
7 Input accounting entries in a combination journal using computer system
8 Input accounting entries pertaining to notes and interest using computer system
9 Input accounting entries pertaining to accrued interest income using computer system
10 Input accounting entries pertaining to accrued interest expense using computer system
11 Input accounting entries pertaining to payroll using computer system
12 Input accounting entries pertaining to payroll tax using computer system
13 Input accounting entries pertaining to corporation income tax using computer system
14 Input accounting entries to adjust account using computer system
15 Post directly to ledger from source documents using computer system
16 Post to ledger account from journals using computer system
17 Input corrections for errors indicated by trial balance using computer system

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1 Input accounting entries to open bookkeeping system for new business using computer system
2 Input closing journal entries using computer system
3 Foot and prove cash journals on computer system
4 Print worksheet using computer system
5 Print post-closing trial balance using computer system
6 Print income statement using computer system
7 Print capital statement using computer system
8 Print balance sheet using computer system
9 Print schedule of accounts payable using computer system
10 Print schedule of accounts receivable using computer system
11 Print schedule of cost of goods sold using computer system
12 Print invoices for payments due using computer system
13 Print customer's statement of accounts using computer system

14 Print cash disbursement reports using computer system
15 Print checks to pay bills for business using computer system

DUTY C: Maintaining Office Equipment

TASKS:
1 Change ribbon on printer
2 Clean equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor equipment malfunctions
5 Recommend service on equipment
6 Load/change paper in printer
7 Report equipment malfunctions to supervisor
8 Record operating and down time

DUTY D: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 Verify calculations on source documents using computer system
8 Process incoming telephone calls
9 Process outgoing telephone calls
10 Clean and straighten up work area
11 Equip work station with supplies and forms
12 Record outgoing long distance telephone calls
13 Prioritize work
14 File materials using subject filing system
15 Perform data protection procedures during power failure
16 Perform power conservation and data protection procedures during air conditioning failure
17 Follow procedures to maintain confidentiality of data
18 Maintain system access security

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

COMPUTER OPERATION AND PROGRAMMING CLUSTER

Terminal Operator

Computer Operator

*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

NOTE:

The duties and tasks found in these task lists form the basis of instructional content for secondary, postsecondary and adult occupational training programs. Orientation level instruction, usually offered in grades 9, 10, and 11, is a vital component of all vocational education programs and provides a strong foundation and vehicle for transitioning into occupational training programs.

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COMPUTER OPERATION AND PROGRAMMING CLUSTER MATRIX

TO = Terminal Operator
CO = Computer Operator

PROCESSING DATA USING COMPUTER EQUIPMENT

	TO	CO
1 Sequence jobs to be run		X
2 Perform power-on procedures		X
3 Prepare job control parameters		X
4 Perform power-off procedures		X
5 Obtain forms needed for job		X
6 Mount carriage control tape		X
7 Mount disk packs		X
8 Mount tapes		X
9 Input data using card reader		X
10 Duplicate cards using card punch		X
11 Correct cards using card punch		X
12 Load operating system		X
13 Load programs, files or data bases		X
14 Run programs using time-sharing system		X
15 Input data via operator's console		X
16 Monitor data processing via console		X
17 Transmit data to remote users		X
18 Receive data from remote users		X
19 Perform halt/restart procedures		X
20 Run tests on programs		X
21 Copy files for backup or media conversion		X
22 Perform shift turnover procedures		X
23 Remove output from machine		X

MAINTAINING OFFICE EQUIPMENT

	TO	CO
1 Clear card jam		X
2 Clear paper jam		X
3 Load/change paper in printer		X
4 Change ribbon on printer		X
5 Report equipment malfunctions to supervisor	X	X
6 Record operating and down time	X	X
7 Repair minor equipment malfunctions	X	X
8 Recommend service on equipment	X	X
9 Clean equipment	X	X
10 Clean card readers, printers and tape drives		X

MAINTAINING TAPE AND DISK PACK LIBRARY

	TO	CO
1 Initialize disk packs		X
2 Initialize tapes		X
3 Cut tape and position new load point markers		X
4 Prepare external tape and disk pack labels		X
5 File disk packs and tapes		X
6 Research internal label discrepancies		X
7 Restore lost data onto disk packs and tapes		X

PERFORMING CLERICAL ACTIVITIES

	TO	CO
1 Process incoming telephone calls	X	X
2 Process outgoing telephone calls	X	X

	TO	CO
3 Perform data protection procedures during power failure	X	X
4 Perform power conservation and data protection procedures during air conditioning failure	X	X
5 Update operator's manual		X
6 Follow procedures to maintain confidentiality of data	X	X
7 Maintain security of computer facility		X
8 Maintain system access security	X	X
9 Clean and straighten up work area	X	X
10 Equip work station with office supplies and office forms	X	X
11 Prepare documents and batch tickets for data entry	X	
12 Prepare worker production log	X	X
13 Record outgoing long distance telephone calls	X	X
14 Process incoming mail	X	
15 Process outgoing mail	X	
16 Maintain mailing list electronically	X	

PROCESSING INCOMING JOBS AND FINAL OUTPUT

	TO	CO
1 Keep log of processing jobs		X
2 Submit jobs for computer processing		X
3 Determine status of processed and pending jobs		X
4 Verify computer output against user request specifications		X
5 Observe for abnormal termination of jobs		X
6 Burst and decollate output		X
7 Distribute output		X
8 File printouts, processed forms, punched cards or job instruction sheets		X

INPUTTING AND STORING DOCUMENTS AND FILES

	TO	CO
1 Input data into spreadsheet formats	X	
2 Input data to prepare graphs and charts	X	
3 Input data into data base files	X	
4 Create backup files	X	

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

	TO	CO
1 Update existing records in data base files	X	
2 Update data on spreadsheets	X	
3 Update data on graphs and charts	X	
4 Delete text or data from storage	X	
5 Add data to backup files	X	
6 Delete data from backup files	X	
7 Process text and data using integrated software	X	

PROCESSING MAIL

	TO	CO
1 Process incoming mail	X	
2 Process outgoing mail	X	
3 Maintain mailing list electronically	X	

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

TERMINAL OPERATOR

DUTY A: Inputting and Storing Documents and Files

TASKS:
1 Input data into spreadsheet formats
2 Input data to prepare graphs and charts
3 Input data into data base files
4 Create backup files

DUTY B: Editing and Correcting Documents, Records and Files

TASKS:
1 Update existing records in data base files
2 Update data on spreadsheets
3 Update data on graphs and charts
4 Delete text or data from storage
5 Add data to backup files
6 Delete data from backup files
7 Process text and data using integrated software

DUTY C: Maintaining Office Equipment

TASKS:
1 Repair minor equipment malfunctions
2 Recommend service on equipment
3 Clean equipment
4 Report equipment malfunctions to supervisor
5 Record operating and down time

DUTY D: Performing Clerical Activities

TASKS:
1 Clean and straighten up work area
2 Equip work station with office supplies and office forms
3 Prepare documents and batch tickets for data entry
4 Prepare worker production log
5 Process incoming telephone calls
6 Process outgoing telephone calls
7 Record outgoing long distance telephone calls
8 Perform data protection procedures during power failure
9 Perform power conservation and data protection procedures during air conditioning failure
10 Follow procedures to maintain confidentiality of data
11 Process incoming mail
12 Process outgoing mail
13 Maintain mailing list electronically
14 Maintain system access security

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Processing Data Using Computer Equipment

TASKS:
1 Sequence jobs to be run
2 Perform power-on procedures
3 Prepare job control parameters
4 Perform power-off procedures
5 Obtain forms needed for job
6 Mount carriage control tape
7 Mount disk packs
8 Mount tapes
9 Input data using card reader
10 Duplicate cards using card punch
11 Correct cards using card punch
12 Load operating system
13 Load programs, files or data bases
14 Run programs using time-sharing system
15 Input data via operator's console
16 Monitor data processing via console
17 Transmit data to remote users
18 Receive data from remote users
19 Perform halt/restart procedures
20 Run tests on programs
21 Copy files for backup or media conversion
22 Perform shift turnover procedures
23 Remove output from machine

DUTY B: Maintaining Office Equipment

TASKS:
1 Clean card readers, printers and tape drives
2 Clear card jam
3 Clear paper jam
4 Load/change paper in printer
5 Change ribbon on printer
6 Report equipment malfunctions to supervisor
7 Record operating and down time
8 Recommend service on equipment
9 Clean equipment
10 Repair minor equipment malfunctions

DUTY C: Maintaining Tape and Disk Pack Library

TASKS:
1 Initialize disk packs
2 Initialize tapes
3 Cut tape and position new load point markers
4 Prepare external tape and disk pack labels
5 File disk packs and tapes
6 Research internal label discrepancies
7 Restore lost data onto disk packs and tapes

DUTY D: Performing Clerical Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Perform data protection procedures during power failure

4 Perform power conservation and data protection procedures during air conditioning failure
5 Update operator's manual
6 Follow procedures to maintain confidentiality of data
7 Maintain security of computer facility
8 Maintain system access security
9 Clean and straighten up work area
10 Equip work station with office supplies and office forms
11 Record outgoing long distance telephone calls
12 Prepare worker production log

DUTY E: Processing Incoming Jobs and Final Output

TASKS:
1 Keep log of processing jobs
2 Submit jobs for computer processing
3 Determine status of processed and pending jobs
4 Verify computer output against user request specifications
5 Observe for abnormal termination of job
6 Burst and decollate output
7 Distribute output
8 File printouts, processed forms, punched cards or job instruction sheets

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

INFORMATION PROCESSING CLUSTER

Word Processor

Information Specialist

Accounting Clerk, Data Processing

Terminal Operator

Payroll Clerk, Data Processing

*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

WP = Word Processor
IS = Information Specialist
AD = Accounting Clerk, Data Processing
TO = Terminal Operator
PD = Payroll Clerk, Data Processing

INPUTTING AND STORING DOCUMENTS AND FILES

	WP	IS	AD	TO	PD
1 Initialize diskettes	X	X			
2 Key correspondence from longhand or edited rough draft	X	X			
3 Key correspondence from machine transcription	X	X			
4 Key business reports or manuscripts from longhand or edited rough draft	X	X			
5 Key business reports or manuscripts from machine transcription	X	X			
6 Key meeting minutes from longhand or edited rough draft	X	X			
7 Key meeting minutes from machine transcription	X	X			
8 Key outlines from longhand or edited rough draft	X	X			
9 Key outlines from machine transcription	X	X			
10 Key agenda from longhand or edited rough draft	X	X			
11 Key agenda from machine transcription	X	X			
12 Key news release from longhand or edited rough draft	X	X			
13 Key news release from machine transcription	X	X			
14 Input data using optical character recognition equipment	X	X			
15 Input data into spreadsheet formats	X	X		X	
16 Input data to prepare graphs and charts	X	X		X	
17 Input data into data base files	X	X		X	
18 Key mailing labels or envelopes	X	X			
19 Key tabular information	X	X			
20 Create backup files	X	X		X	
21 Create glossary file	X	X			
22 Store repetitive material	X	X			
23 Update spelling dictionary	X	X			

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

	WP	IS	AD	TO	PD
1 Proofread document for content, format and typographical errors	X	X			
2 Move (rearrange) text	X	X			
3 Search and replace text	X	X			
4 Insert and delete text	X	X			
5 Rename files	X	X			
6 Insert end-of-line hyphens into text	X	X			
7 Prepare new document from existing documents	X	X			
8 Update existing records in data base files	X	X		X	
9 Update data on spreadsheets	X	X		X	
10 Update data on graphs and charts	X	X		X	
11 Verify data and correct errors	X	X			
12 Delete text or data from storage	X	X		X	
13 Copy one diskette to another	X	X			
14 Add data to the backup files	X	X		X	
15 Delete data from backup files	X	X		X	
16 Process text and data using integrated software		X		X	

PRINTING, DISTRIBUTING AND RECEIVING OUTPUT

	WP	IS	AD	TO	PD
1 Print documents or reports using continuous-feed (fanfold or pinfeed) paper	X	X			
2 Print documents or reports using single-sheet paper	X	X			
3 Print documents by interfacing word processing equipment with phototypesetting equipment	X	X			
4 Print information according to sort criteria	X	X			
5 Transmit data via modem	X	X			
6 Receive data via modem	X	X			
7 Separate continuous-feed forms or paper	X	X			
8 Sort completed jobs for distribution	X	X			
9 Print mailing labels or envelopes	X	X			

MAINTAINING OFFICE EQUIPMENT

	WP	IS	AD	TO	PD
1 Change ribbon on word processing unit	X	X			
2 Repair minor equipment malfunctions	X	X	X	X	X
3 Recommend service on equipment	X	X	X	X	X
4 Perform maintenance functions on photocopier such as changing toner and replacing paper	X		X		X
5 Clean equipment	X	X	X	X	X
6 Change ribbon on printer	X	X	X		X
7 Change printwheel on printer	X	X			
8 Load/change paper in printer	X	X	X		X
9 Report equipment malfunctions to supervisor	X	X	X	X	X
10 Record operating and down time	X	X	X	X	X

PERFORMING CLERICAL ACTIVITIES

	WP	IS	AD	TO	PD
1 Clean and straighten up work area	X	X	X	X	X
2 Verify calculations made by others	X	X			
3 Equip work station with supplies and forms	X	X	X	X	X
4 Duplicate materials on photocopying machine	X	X	X		X
5 Collate and bind documents	X	X			
6 Resolve user problems	X	X			
7 Prepare worker production log	X	X		X	
8 Prioritize work	X	X	X		
9 Prepare documents and batch tickets for data entry		X		X	
10 Maintain payroll processing procedures manual					X
11 Set up new files			X		X
12 File materials using alphabetic filing system			X		X
13 File materials using numeric filing system			X		X
14 File materials using subject filing system			X		X
15 Verify calculations on source documents using computer system			X		
16 Process incoming telephone calls	X	X	X	X	X
17 Process outgoing telephone calls	X	X	X	X	X
18 Record outgoing long distance telephone calls	X	X	X	X	X
19 Process incoming mail	X	X	X	X	X
20 Process outgoing mail	X	X	X	X	X
21 Maintain mailing list electronically	X	X		X	
22 Perform data protection procedures during power failure	X	X	X	X	X
23 Perform power conservation and data protection procedures during air conditioning failure	X	X	X	X	X

	WP	IS	AD	TO	PD
24 Follow procedures to maintain confidentiality of data	X	X	X	X	X
25 Maintain system access security	X	X	X	X	X

FILING MATERIALS MANUALLY

	WP	IS	AD	TO	PD
1 Maintain magnetic media file	X	X			
2 Maintain software library	X	X			
3 Maintain non-electronic filing system	X	X			
4 Secure classified or confidential materials	X	X			

RECORDING ENTRIES IN JOURNALS AND LEDGERS

	WP	IS	AD	TO	PD
1 Input accounting entries for buying merchandise on account using computer system			X		
2 Input accounting entries for cash payments using computer system			X		
3 Input accounting entries for selling merchandise on account using computer system			X		
4 Input accounting entries pertaining to cash receipts using computer system			X		
5 Post from cash journals using computer system			X		
6 Input accounting entries pertaining to sales tax using computer system			X		
7 Input accounting entries in a combination journal using computer system			X		
8 Input accounting entries pertaining to notes and interest using computer system			X		
9 Input accounting entries pertaining to accrued interest income using computer system			X		
10 Input accounting entries pertaining to accrued interest expense using computer system			X		
11 Input accounting entries pertaining to payroll using computer system			X		
12 Input accounting entries pertaining to payroll tax using computer system			X		
13 Input accounting entries pertaining to corporation income tax using computer system			X		
14 Input accounting entries to adjust account using computer system			X		
15 Post directly to ledger from source documents using computer system			X		
16 Post to ledger account from journals using computer system			X		
17 Input corrections for errors indicated by trial balance using computer system			X		

ACCOMPLISHING PERIODIC ACCOUNTING/REPORTING ACTIVITIES

	WP	IS	AD	TO	PD
1 Input accounting entries to open bookkeeping system for new business using computer system			X		
2 Input closing journal entries using computer system			X		
3 Foot and prove cash journals on computer system			X		
4 Print worksheet using computer system			X		
5 Print post-closing trial balance using computer system			X		
6 Print income statement using computer system			X		

	WP	IS	AD	TO	PD
7 Print capital statement using computer system		X			
8 Print balance sheet using computer system		X			
9 Print schedule of accounts payable using computer system		X			
10 Print schedule of accounts receivable using computer system		X			
11 Print schedule of cost of goods sold using computer system		X			
12 Print invoices for payments due using computer system		X			
13 Print customer's statement of accounts using computer system		X			
14 Print cash disbursement reports using computer system		X			
15 Print checks to pay bills for business using computer system		X			

PROCESSING EMPLOYEE BENEFITS

	WP	IS	AD	TO	PD
1 Input data to complete individual record of employment					X
2 Input data relating to employee pension plan					X
3 Input data relating to employee dental insurance					X
4 Input data relating to employee health insurance					X
5 Input data relating to employee life insurance					X
6 Input data relating to employee sick leave					X
7 Input data relating to employee vacation leave					X
8 Input data relating to employee disability leave					X
9 Input data relating to employee leaves of absence such as jury duty or military leave					X
10 Input data relating to employee savings plans					X
11 Input data relating to employee credit unions					X
12 Input data to prepare benefit termination forms					X
13 Input data relating to worker's compensation forms					X

MAINTAINING EMPLOYEE PAYROLL RECORDS

	WP	IS	AD	TO	PD
1 Input data for new employee record in master employee file using computer system					X
2 Input data to change employee record in master employee file					X
3 Input data to remove employee record from master employee file					X
4 Input data to keep record of daily attendance of employees					X

ACCOMPLISHING PAYROLL ACTIVITIES

	WP	IS	AD	TO	PD
1 Input data to process payroll using computer system					X
2 Input data to prepare individual employee's earnings record using computer system					X
3 Input data to make salary adjustments using computer system					X
4 Input data to prepare salesperson's commission statements using computer system					X
5 Input data to prepare payroll statements using computer system					X
6 Prepare employee's form W-2 using computer system					X
7 Prepare employee's quarterly federal tax returns using computer system (form 941)					X

	WP	IS	AD	TO	PD
8 Prepare employer's quarterly state tax returns using computer system					X
9 Prepare employer's annual reconciliation reports of income tax withheld using computer system (form W-3)					X
10 Prepare employer's annual federal unemployment tax report using computer system (form 940)					X
11 Prepare state unemployment tax report using computer system					X
12 Prepare FICA tax reports using computer system					X
13 Distribute payroll checks					X
14 Prepare payroll to be processed on computer system					X

PERFORMING FINANCIAL ACTIVITIES

	WP	IS	AD	TO	PD
1 Process payroll using computer		X			
2 Prepare financial statements using computer		X			
3 Process accounts payable using computer		X			
4 Process accounts receivable using computer		X			
5 Control merchandise inventory using computer		X			
6 Control equipment inventory using computer		X			
7 Control office supply and office form inventory using computer		X			

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key correspondence from longhand or edited rough draft
3 Key correspondence from machine transcription
4 Key business reports or manuscripts from longhand or edited rough draft
5 Key business reports or manuscripts from machine transcription
6 Key meeting minutes from longhand or edited rough draft
7 Key meeting minutes from machine transcription
8 Key outlines from longhand or edited rough draft
9 Key outlines from machine transcription
10 Key agenda from longhand or edited rough draft
11 Key agenda from machine transcription
12 Key news release from longhand or edited rough draft
13 Key news release from machine transcription
14 Input data using optical character recognition equipment
15 Input data into spreadsheet formats
16 Input data to prepare graphs and charts
17 Input data into data base files
18 Key mailing labels or envelopes
19 Key tabular information
20 Create backup files
21 Create glossary file
22 Store repetitive material
23 Update spelling dictionary

DUTY B: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread document for content, format and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert and delete text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Update existing records in data base files
9 Update data on spreadsheets
10 Update data on graphs and charts
11 Verify data and correct errors
12 Delete text or data from storage
13 Copy one diskette to another
14 Add data to the backup files
15 Delete data from backup files

DUTY C: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed (fanfold or pinfeed) paper
2 Print documents or reports using single-sheet paper
3 Print documents by interfacing word processing equipment with phototypesetting equipment

4 Print information according to sort criteria
5 Transmit data via modem
6 Receive data via modem
7 Separate continuous-feed forms or paper
8 Sort completed jobs for distribution
9 Print mailing labels or envelopes

DUTY D: Maintaining Office Equipment

TASKS:
1 Change ribbon on word processing unit
2 Repair minor equipment malfunctions
3 Recommend service on equipment
4 Perform maintenance functions on photocopier such as changing toner and replacing paper
5 Clean equipment
6 Change ribbon on printer
7 Change printwheel on printer
8 Load/change paper in printer
9 Report equipment malfunction to supervisor
10 Record operating and down time

DUTY E: Performing Clerical Activities

TASKS:
1 Clean and straighten up work area
2 Verify calculations made by others
3 Equip work station with supplies and forms
4 Duplicate materials on photocopying machine
5 Collate and bind documents
6 Resolve user problems
7 Prepare worker production log
8 Prioritize work
9 Process incoming telephone calls
10 Process outgoing telephone calls
11 Record outgoing long distance telephone calls
12 Process incoming mail
13 Process outgoing mail
14 Maintain mailing list electronically
15 Perform data protection procedures during power failure
16 Perform power conservation and data protection procedures during air conditioning failure
17 Follow procedures to maintain confidentiality of data
18 Maintain system access security

DUTY F: Filing Materials Manually

TASKS:
1 Maintain magnetic media file
2 Maintain software library
3 Maintain non-electronic filing system
4 Secure classified or confidential materials

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

INFORMATION SPECIALIST

DUTY A: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key correspondence from longhand or edited rough draft
3 Key correspondence from machine transcription
4 Key business reports or manuscripts from longhand or edited rough draft
5 Key business reports or manuscripts from machine transcription
6 Key meeting minutes from longhand or edited rough draft
7 Key meeting minutes from machine transcription
8 Key outlines from longhand or edited rough draft
9 Key outlines from machine transcription
10 Key agenda from longhand or edited rough draft
11 Key agenda from machine transcription
12 Key news release from longhand or edited rough draft
13 Key news release from machine transcription
14 Input data using optical character recognition equipment
15 Input data into spreadsheet formats
16 Input data to prepare graphs and charts
17 Input data into data base files
18 Key mailing labels or envelopes
19 Create backup files
20 Create glossary file
21 Store repetitive material
22 Update spelling dictionary
23 Key tabular information

DUTY B: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread document for content, format and typographical errors
2 Move (re-arrange) text
3 Search and replace text
4 Insert and delete text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Update existing records in data base files
9 Update data on spreadsheets
10 Update data on graphs and charts
11 Verify data and correct errors
12 Delete text or data from storage
13 Copy one diskette to another
14 Add data to backup files
15 Delete data from backup files
16 Process text and data using integrated software

DUTY C: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed (fanfold or pinfeed) paper
2 Print documents or reports using single-sheet paper
3 Print document by interfacing word processing equipment

with phototypesetting equipment
4 Print information according to sort criteria
5 Transmit data via modem
6 Receive data via modem
7 Separate continuous-feed forms or paper
8 Sort completed jobs for distribution
9 Print mailing labels or envelopes

DUTY D: Maintaining Office Equipment

TASKS: 1 Change ribbon on word processing unit
2 Repair minor equipment malfunctions
3 Recommend service on equipment
4 Clean equipment
5 Change ribbon on printer
6 Change printwheel on printer
7 Load/change paper in printer
8 Report equipment malfunctions to supervisor
9 Record operating and down time

DUTY E: Performing Clerical Activities

TASKS: 1 Clean and straighten up work area
2 Verify calculations made by others
3 Equip work station with supplies and forms
4 Duplicate materials on photocopying machine
5 Collate and bind documents
6 Resolve user problems
7 Prepare documents and batch tickets for data entry
8 Prioritize work
9 Prepare worker production log
10 Process incoming telephone calls
11 Process outgoing telephone calls
12 Record outgoing long distance telephone calls
13 Process incoming mail
14 Process outgoing mail
15 Maintain mailing list electronically
16 Perform data protection procedures during power failure
17 Perform power correction and data protection procedures during air conditioning failure
18 Follow procedures to maintain confidentiality of data
19 Maintain system access security

DUTY F: Filing Materials Manually

TASKS: 1 Maintain magnetic media file
2 Maintain software library
3 Maintain non-electronic filing system
4 Secure classified or confidential materials

DUTY G: Performing Financial Activities

TASKS:
1 Process payroll using computer
2 Prepare financial statements using computer
3 Process accounts payable using computer
4 Process accounts receivable using computer
5 Control merchandise inventory using computer
6 Control equipment inventory using computer
7 Control office supply and office form inventory using computer

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

ACCOUNTING CLERK, DATA PROCESSING

DUTY A: Recording Entries in Journals and Ledgers

TASKS:
1 Input accounting entries for buying merchandise on account using computer system
2 Input accounting entries for cash payment using computer system
3 Input accounting entries for selling merchandise on account using computer system
4 Input accounting entries pertaining to cash receipts using computer system
5 Post from cash journals using computer system
6 Input accounting entries pertaining to sales tax using computer system
7 Input accounting entries in a combination journal using computer system
8 Input accounting entries pertaining to notes and interest using computer system
9 Input accounting entries pertaining to accrued interest income using computer system
10 Input accounting entries pertaining to accrued interest expense using computer system
11 Input accounting entries pertaining to payroll using computer system
12 Input accounting entries pertaining to payroll tax using computer system
13 Input accounting entries pertaining to corporation income tax using computer system
14 Input accounting entries to adjust account using computer system
15 Post directly to ledger from source documents using computer system
16 Post to ledger account from journals using computer system
17 Input corrections for errors indicated by trial balance using computer system

DUTY B: Accomplishing Periodic Accounting/Reporting Activities

TASKS:
1 Input accounting entries to open bookkeeping system for new business using computer system
2 Input closing journal entries using computer system
3 Foot and prove cash journals on computer system
4 Print worksheet using computer system
5 Print post-closing trial balance using computer system
6 Print income statement using computer system
7 Print capital statement using computer system
8 Print balance sheet using computer system
9 Print schedule of accounts payable using computer system
10 Print schedule of accounts receivable using computer system
11 Print schedule of cost of goods sold using computer system
12 Print invoices for payments due using computer system
13 Print customer's statement of accounts using computer system

14 Print cash disbursement reports using computer system
15 Print checks to pay bills for business using computer system

DUTY C: Maintaining Office Equipment

TASKS:
1 Change ribbon on printer
2 Clean equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor equipment malfunctions
5 Recommend service on equipment
6 Load/change paper in printer
7 Report equipment malfunctions to supervisor
8 Record operating and down time

DUTY D: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 Verify calculations on source documents using computer system
8 Process incoming telephone calls
9 Process outgoing telephone calls
10 Clean and straighten up work area
11 Equip work station with supplies and forms
12 Record outgoing long distance telephone calls
13 Prioritize work
14 File materials using subject filing system
15 Perform data protection procedures during power failure
16 Perform power conservation and data protection procedures during air conditioning failure
17 Follow procedures to maintain confidentiality of data
18 Maintain system access security

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

TERMINAL OPERATOR

DUTY A: Inputting and Storing Documents and Files

TASKS:
1 Input data into spreadsheet formats
2 Input data to prepare graphs and charts
3 Input data into data base files
4 Create backup files

DUTY B: Editing and Correcting Documents, Records and Files

TASKS:
1 Update existing records in data base files
2 Update data on spreadsheets
3 Update data on graphs and charts
4 Delete text or data from storage
5 Add data to backup files
6 Delete data from backup files
7 Process text and data using integrated software

DUTY C: Maintaining Office Equipment

TASKS:
1 Repair minor equipment malfunctions
2 Recommend service on equipment
3 Clean equipment
4 Report equipment malfunctions to supervisor
5 Record operating and down time

DUTY D: Performing Clerical Activities

TASKS:
1 Clean and straighten up work area
2 Equip work station with office supplies and office forms
3 Prepare documents and batch tickets for data entry
4 Prepare worker production log
5 Process incoming telephone calls
6 Process outgoing telephone calls
7 Record outgoing long distance telephone calls
8 Perform data protection procedures during power failure
9 Perform power conservation and data protection procedures during air conditioning failure
10 Follow procedures to maintain confidentiality of data
11 Process incoming mail
12 Process outgoing mail
13 Maintain mailing list electronically
14 Maintain system access security

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

PAYROLL CLERK, DATA PROCESSING

DUTY A: Processing Employee Benefits

TASKS:
1 Input data to complete individual record of employment
2 Input data relating to employee pension plan
3 Input data relating to employee dental insurance
4 Input data relating to employee health insurance
5 Input data relating to employee life insurance
6 Input data relating to employee sick leave
7 Input data relating to employee vacation leave
8 Input data relating to employee disability leave
9 Input data relating to employee leave of absence such as jury duty or military leave
10 Input data relating to employee savings plan
11 Input data relating to employee credit union
12 Input data to prepare benefit termination forms
13 Input data relating to worker's compensation forms

DUTY B: Maintaining Employee Payroll Records

TASKS:
1 Input data for new employee record in master employee file using computer system
2 Input data to change employee record in master employee file
3 Input data to remove employee record from master employee file
4 Input data to keep record of daily attendance of employees

DUTY C: Accomplishing Payroll Activities

TASKS:
1 Input data to process payroll using computer system
2 Input data to prepare individual employee's earnings record using computer system
3 Input data to make salary adjustments using computer system
4 Input data to prepare salesperson's commission statements using computer system
5 Input data to prepare payroll statements using computer system
6 Prepare employee's form W-2 using computer system
7 Prepare employee's quarterly federal tax returns using computer system (form 941)
8 Prepare employer's quarterly state tax returns using computer system
9 Prepare employer's annual reconciliation reports of income tax withheld using computer system (form W-3)
10 Prepare employer's annual federal unemployment tax report using computer system (form 940)
11 Prepare state unemployment tax return using computer system
12 Prepare FICA tax reports using computer system
13 Distribute payroll checks
14 Prepare payroll to be processed on computer system

DUTY D: Maintaining Office Equipment

TASKS:
1 Change ribbon on printer
2 Recommend service on equipment
3 Load/change paper in printer
4 Clean equipment
5 Repair minor equipment malfunctions
6 Perform maintenance functions on photocopier such as changing toner and replacing paper
7 Report equipment malfunction to supervisor
8 Record operating and down time

DUTY E: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Process outgoing mail
3 Process incoming mail
4 Set up new files
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Maintain payroll processing procedures manual
9 Equip work station with supplies and forms
10 Process incoming telephone calls
11 Process outgoing telephone calls
12 Clean and straighten up work area
13 Record outgoing long distance telephone calls
14 Perform data protection procedures during power failure
15 Perform power conservation and data protection procedures during air conditioning failure
16 Follow procedures to maintain confidentiality of data
17 Maintain system access security
18 Prioritize work

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

SECRETARIAL CLUSTER

Stenographer

Secretary

Legal Secretary

Medical Secretary

*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

ST = Stenographer
SC = Secretary
LS = Legal Secretary
MS = Medical Secretary

TYPEWRITING

	ST	SC	LS	MS
1 Type from longhand or edited rough draft copy	X	X	X	X
2 Type letters	X	X	X	X
3 Type memos	X	X	X	X
4 Type tables	X	X	X	X
5 Type manuscripts	X	X	X	X
6 Type technical reports	X	X	X	X
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography	X	X	X	X
8 Type outlines	X	X	X	X
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards	X	X	X	X
10 Type labels such as address labels, file folder labels or file drawer labels	X	X	X	X
11 Type birth record				X
12 Type death record				X
13 Type offset masters	X	X		
14 Type statistical reports	X	X		
15 Type graphs	X	X		
16 Type legal documents	X		X	
17 Type income tax returns			X	

PROCESSING MAIL

	ST	SC	LS	MS
1 Process incoming mail	X	X	X	X
2 Maintain mail distribution list	X	X	X	X
3 Forward mail	X	X	X	X
4 Process outgoing mail	X	X	X	X
5 Prepare packages for shipping	X	X	X	X
6 Prepare specialized mail such as registered, certified or insured mail	X	X	X	X
7 Maintain mailing list manually	X	X	X	X
8 Maintain mailing list on computer or word processor	X	X	X	X
9 Process bulk mailing	X	X	X	X

COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

	ST	SC	LS	MS
1 Make notes on employer's mail	X	X	X	X
2 Make travel arrangements	X	X	X	X
3 Prepare travel expense vouchers	X	X	X	X
4 Schedule appointments or meetings	X	X	X	X
5 Maintain appointment book	X	X	X	X
6 Prepare daily schedule of appointments	X	X	X	X
7 Cancel and reschedule appointments or meetings	X	X	X	X
8 Make arrangements for meetings	X	X	X	X
9 Prepare and distribute minutes of meeting	X	X	X	X
10 Arrange conferences		X	X	X
11 Maintain appointments and meeting schedules on computer	X	X	X	X

	ST	SC	LS	MS
12 Schedule hospital admission, ancillary testing, out-patient surgery, or referral to colleagues for patients				X
13 Review technical journals for articles of interest		X	X	X
14 Notarize documents		X	X	X
15 Schedule court hearings			X	

RECEIVING VISITORS, PATIENTS OR CLIENTS

	ST	SC	LS	MS
1 Receive visitors or clients	X	X	X	
2 Receive visitor, patients or clients				X
3 Introduce visitors or clients	X	X	X	
4 Explain schedule changes to waiting visitors or clients	X	X	X	
5 Register new patients				X
6 Maintain log of visitors or clients	X	X	X	
7 Introduce visitors, patients or clients				X
8 Explain schedule changes to waiting visitors, patients or clients				X
9 Maintain a log of visitors, patients or clients				X

PERFORMING TELECOMMUNICATIONS ACTIVITIES

	ST	SC	LS	MS
1 Process incoming telephone calls	X	X	X	X
2 Process outgoing telephone calls	X	X	X	X
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers	X	X	X	X
4 Record outgoing long distance telephone calls	X	X	X	X
5 Maintain telephone listings on computer or word processor	X	X	X	X

MAINTAINING OFFICE SUPPLIES AND FORMS

	ST	SC	LS	MS
1 Equip desk with office supplies and forms	X	X	X	X
2 Order supplies and forms for office		X	X	X
3 Receive office supplies and forms		X	X	X
4 Store office supplies and forms		X	X	X
5 Issue office supplies and forms		X	X	X
6 Receive medical supplies and medications				X
7 Store medical supplies and medications				X
8 Prepare office supply and office form inventory records manually	X	X	X	X
9 Process office supply and office form inventory reports on computer or word processor	X	X	X	X

MAINTAINING OFFICE EQUIPMENT

	ST	SC	LS	MS
1 Change office equipment ribbons	X	X	X	X
2 Clean office equipment		X	X	X
3 Perform maintenance functions on photocopier such as changing toner and replacing paper	X	X	X	X
	X	X	X	X
4 Repair minor office equipment malfunctions	X	X	X	X
5 Recommend service on office equipment	X	X	X	X
6 Place service calls for office equipment	X	X	X	X
7 Schedule office equipment for routine maintenance		X	X	X
8 Order office equipment		X	X	X
9 Receive office equipment		X	X	X

	ST	SC	LS	MS
10 Recommend purchase or lease of office equipment		X	X	X
11 Inventory office equipment		X	X	X
12 Process office equipment repair records manually		X	X	X

ORGANIZING AND PLANNING

	ST	SC	LS	MS
1 Plan office layout and workflow		X	X	X
2 Prioritize work	X	X	X	X
3 Maintain the reception room		X	X	X
4 Schedule custodial and maintenance services		X	X	X
5 Maintain professional reference library	X	X	X	X
6 Expedite charitable and civic contributions		X	X	X

PERFORMING CLERICAL ACTIVITIES

	ST	SC	LS	MS
1 Duplicate materials on photocopying machine	X	X	X	X
2 Collate and bind documents	X	X	X	X
3 Verify calculations made by others	X	X	X	X
4 Put up bulletin board display	X	X	X	X
5 Clean and straighten up work area	X	X	X	X
6 Label exhibits presented in court			X	

FILING MATERIALS MANUALLY

	ST	SC	LS	MS
1 Establish manual filing system	X	X	X	X
2 Establish cross referencing system	X	X	X	X
3 Establish file index system	X	X	X	X
4 Establish file checkout system	X	X	X	X
5 File materials using alphabetic filing system	X	X	X	X
6 File materials using numeric filing system	X	X	X	X
7 File materials using subject filing system	X	X	X	X
8 Retrieve materials from files	X	X	X	X
9 Retrieve materials stored on microfilm or microfiche	X	X	X	X
10 Secure classified or confidential files	X	X	X	X
11 Locate misfiles	X	X	X	X
12 Establish record retention policies		X	X	X
13 Transfer materials to inactive files	X	X	X	X
14 Purge files	X	X	X	X
15 Update cross referencing system and file index system	X	X	X	X
16 Revise file checkout system	X	X	X	X
17 Update filing system and files	X	X	X	X
18 Arrange for filing of special materials		X	X	X
19 Sort materials for alphabetic filing	X	X	X	X
20 Sort materials for numeric filing	X	X	X	X
21 Sort materials for subject filing	X	X	X	X
22 Code materials for filing	X	X	X	X

TAKING AND TRANSCRIBING DICTATION

	ST	SC	LS	MS
1 Take dictation using shorthand	X	X	X	X
2 Transcribe shorthand dictation	X	X	X	X
3 Transcribe dictation from recorded media	X	X	X	X
4 Take medical dictation and transcribe medical documents				X
5 Take legal dictation and transcribe legal documents			X	

SUPERVISING AND TRAINING

	ST	SC	LS	MS
1 Maintain personnel records		X	X	X
2 Orient new employees		X	X	X
3 Assign work to others		X	X	X
4 Evaluate work methods and procedures		X	X	X
5 Interview applicants for employment		X		
6 Prepare employee evaluation reports		X		

PREPARING WRITTEN COMMUNICATIONS

	ST	SC	LS	MS
1 Compile information for reports or correspondence	X	X	X	X
2 Compose correspondence	X	X	X	X
3 Compose reports	X	X	X	X
4 Edit documents	X	X	X	X
5 Prepare office manuals		X	X	X
6 Prepare and send cablegrams, telegrams and mailgrams	X	X	X	X
7 Prepare newspaper ads		X		
8 Prepare news releases		X		
9 Prepare graphic materials manually	X	X		

PERFORMING FINANCIAL ACTIVITIES

	ST	SC	LS	MS
1 Process charge slips		X	X	X
2 Prepare itemized bills, invoices or statements manually		X	X	X
3 Process payments manually		X	X	X
4 Reconcile cash count with payments		X	X	X
5 Prepare bank deposits		X	X	X
6 Process overdue accounts		X	X	X
7 Process accounts payable invoices manually		X	X	X
8 Make journal entries manually		X	X	X
9 Control petty cash fund		X	X	X
10 Prepare payroll using calculator		X	X	X
11 Prepare financial statements using calculator		X	X	X
12 Process vouchers for payment manually		X	X	X
13 Post entries from journals to ledgers manually			X	X
14 Reconcile bank statements		X	X	X
15 Prepare quarterly tax reports		X	X	
16 Prepare payment vouchers on computer		X	X	
17 Process accounts receivable on computer		X	X	
18 Maintain fee schedule manually			X	
19 Maintain fee schedule on computer or word processor			X	

INPUTTING AND STORING DOCUMENTS AND FILES

	ST	SC	LS	MS
1 Key documents from longhand or edited rough draft	X	X	X	X
2 Key documents from machine transcription	X	X	X	X
3 Key mailing labels and envelopes	X	X	X	X
4 Input documents using optical character recognition equipment	X	X	X	X
5 Input data into spreadsheet formats	X	X	X	X
6 Store repetitive material	X	X	X	X
7 Input data from source documents	X	X	X	X
8 Initialize diskettes	X	X	X	X
9 Input data into graph and charts	X	X	X	
10 Input records into data base files	X	X	X	X

	ST	SC	LS	MS
11 Prepare backup files	X	X	X	X
12 Create glossary file	X	X	X	X
13 Update spelling dictionary	X	X	X	X
14 Store documents on diskettes	X	X	X	X

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

	ST	SC	LS	MS
1 Proofread documents for format, content and typographical errors	X	X	X	X
2 Move (rearrange) text	X	X	X	X
3 Search and replace text	X	X	X	X
4 Insert text	X	X	X	X
5 Rename files	X	X	X	X
6 Insert end-of-line hyphens into text	X	X	X	X
7 Prepare new document from existing documents	X	X	X	X
8 Add new record to files	X	X	X	X
9 Update existing records in files	X	X	X	X
10 Update data on spreadsheets	X	X	X	X
11 Revise stored repetitive material	X	X	X	X
12 Verify data and correct errors	X	X	X	X
13 Delete text, files or records from storage	X	X	X	X
14 Assemble documents from stored text	X	X	X	X
15 Maintain backup files	X	X	X	X
16 Process text and data using integrated software	X	X	X	X
17 Copy one diskette to another	X	X	X	X

PRINTING, DISTRIBUTING AND RECEIVING OUTPUT

	ST	SC	LS	MS
1 Print documents or reports using continuous-feed paper	X	X	X	X
2 Print documents or reports using single-sheet paper	X	X	X	X
3 Print information according to sort criteria	X	X	X	X
4 Receive documents or reports via modem	X	X	X	X
5 Transmit communications using electronic bulletin board or electronic mail	X	X	X	X
6 Print mailing labels or envelopes	X	X	X	X
7 Monitor electronic bulletin board or electronic mail	X	X		
8 Transmit documents or reports via modem	X	X	X	X

PREPARING MEDICAL RECORDS AND INSURANCE FORMS

	ST	SC	LS	MS
1 Assist patient to complete registration form(s)				X
2 Type medical information such as history, notes, clinical resumes and reports into medical records				X
3 Process out-of office examination or treatment information				X
4 Code diagnoses and surgical procedures				X
5 Transcribe codings from clinical records to abstract				X
6 Review medical records for completeness and accuracy				X
7 Complete commercial insurance claim forms				X
8 Complete Medicare payment request forms				X
9 Complete Medicaid claim forms				X
10 Complete worker's compensation claim forms				X
11 Complete disability claim forms				X

PREPARING COURT DOCUMENTS

		ST	SC	LS	MS
1	Prepare adoption papers			X	
2	Prepare affidavits			X	
3	Prepare affidavits for motions and notices			X	
4	Prepare answers			X	
5	Prepare papers for bankruptcy			X	
6	Prepare briefs			X	
7	Prepare complaints on pre-printed forms			X	
8	Prepare complaints from sample forms			X	
9	Prepare complaints from dictation			X	
10	Prepare answers and counterclaims			X	
11	Prepare answers and cross-claims			X	
12	Take depositions			X	
13	Prepare restraining orders (injunctions)			X	
14	Prepare judgments			X	
15	Prepare motions			X	
16	Prepare motions and notices			X	
17	Prepare public notices			X	
18	Prepare orders			X	
19	Prepare petitions from dictation			X	
20	Prepare petitions from sample forms			X	
21	Prepare subpoenas			X	
22	Prepare summons			X	
23	Prepare petitions and certificates for dissolution of marriage			X	
24	Prepare findings of facts and decrees for dissolution of marriage			X	
25	Prepare papers for probate court			X	
26	Prepare final settlements of estates			X	
27	Prepare papers for child support			X	

PREPARING CLIENT DOCUMENTS

		ST	SC	LS	MS
1	Prepare agreements			X	
2	Prepare bills of sale			X	
3	Prepare codicils			X	
4	Prepare contracts from dictation			X	
5	Prepare contracts on pre-printed forms			X	
6	Prepare deeds from dictation			X	
7	Prepare deeds on pre-printed forms			X	
8	Prepare leases from dictation			X	
9	Prepare leases on pre-printed forms			X	
10	Prepare mortgages from dictation			X	
11	Prepare mortgages on pre-printed forms			X	
12	Prepare chattel mortgages on pre-printed forms			X	
13	Prepare promissory notes from dictation			X	
14	Prepare promissory notes on pre-printed forms			X	
15	Prepare powers of attorney from dictation			X	
16	Prepare powers of attorney on pre-printed forms			X	
17	Prepare wills			X	
18	Prepare articles of incorporation			X	
19	Prepare corporation minute books			X	

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type offset masters
12 Type statistical reports
13 Type graphs
14 Type legal documents

DUTY B: Processing Mail

TASKS:
1 Process incoming mail
2 Maintain mail distribution list
3 Forward mail
4 Process outgoing mail
5 Process bulk mailing
6 Prepare packages for shipping
7 Prepare specialized mail such as registered, certified, or insured mail
8 Maintain mailing list manually
9 Maintain mailing list on computer or word processor

DUTY C: Coordinating and Performing Activities for Employer

TASKS:
1 Make notes on employer's mail
2 Make travel arrangements
3 Prepare travel expense vouchers
4 Schedule appointments or meetings
5 Maintain appointment book
6 Prepare daily schedule of appointments
7 Cancel and reschedule appointments or meetings
8 Make arrangements for meetings
9 Prepare and distribute minutes of meeting
10 Maintain appointments and meeting schedules on computer

DUTY D: Receiving Visitors, Patients or Clients

TASKS:
1 Receive visitors or clients
2 Introduce visitors or clients
3 Maintain log of visitors or clients
4 Explain schedule changes to waiting visitors or clients

DUTY E: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Record outgoing long distance telephone calls
5 Maintain telephone listings on computer or word processor

DUTY F: Maintaining Office Supplies and Forms

TASKS:
1 Equip desk with office supplies and office forms
2 Prepare office supply and office form inventory records manually
3 Process office supply and office form inventory reports on computer or word processor

DUTY G: Maintaining Office Equipment

1 Change office equipment ribbons
2 Perform maintenance functions on photocopier such as changing toner and replacing paper
3 Repair minor office equipment malfunctions
4 Recommend service on office equipment
5 Place service calls for office equipment

DUTY H: Organizing and Planning

TASKS:
1 Maintain professional reference library
2 Prioritize work

DUTY I: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Verify calculations made by others
4 Put up bulletin board display
5 Clean and straighten up work area

DUTY J: Filing Materials Manually

TASKS:
1 Establish manual filing system
2 Establish cross referencing system
3 Establish file index system
4 Establish file checkout system
5 Code materials for filing
6 Sort materials for alphabetic filing
7 Sort materials for numeric filing
8 Sort materials for subject filing

9 File materials using alphabetic filing system
10 File materials using numeric filing system
11 File materials using subject filing system
12 Retrieve materials from files
13 Retrieve materials stored on microfilm or microfiche
14 Secure classified or confidential files
15 Locate misfiles
16 Transfer materials to inactive files
17 Purge files
18 Update cross referencing system and file index system
19 Revise file checkout system
20 Update filing system and files

DUTY K: Taking and Transcribing Dictation

TASKS: 1 Take dictation using shorthand
2 Transcribe shorthand dictation
3 Transcribe dictation from recorded media

DUTY L: Preparing Written Communications

TASKS: 1 Compile technical information for reports or correspondence
2 Compose correspondence
3 Compose reports
4 Edit documents
5 Prepare graphic materials manually
6 Prepare and send cablegrams, telegrams, and mailgrams

DUTY M: Inputting and Storing Documents and Files

TASKS: 1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Key mailing labels and envelopes
5 Input documents using optical character recognition equipment
6 Input data into spreadsheet formats
7 Input data into graphs and charts
8 Input records into data base files
9 Prepare backup files
10 Create glossary file
11 Store repetitive material
12 Update spelling dictionary
13 Input data from source documents
14 Store documents on diskettes

DUTY N: Editing and Correcting Documents, Records and Files

TASKS: 1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text

4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing document
8 Add new records to files
9 Update existing records in files
10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files or records from storage
14 Copy one diskette to another
15 Assemble documents from stored text
16 Maintain backup files
17 Process text and data using integrated software

DUTY O: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed paper
2 Print documents or reports using single-sheet paper
3 Print information according to sort criteria
4 Transmit documents or reports via modem
5 Receive documents or reports via modem
6 Transmit communications using an electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electronic mail
8 Print mailing labels or envelopes

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type offset masters
12 Type statistical reports
13 Type graphs

DUTY B: Processing Mail

TASKS:
1 Process incoming mail
2 Maintain mail distribution list
3 Forward mail
4 Process outgoing mail
5 Process bulk mailing
6 Prepare packages for shipping
7 Prepare specialized mail such as registered, certified or insured mail
8 Maintain mailing list manually
9 Maintain mailing list on computer or word processor

DUTY C: Coordinating and Performing Activities for Employer

TASKS:
1 Make notes on employer's mail
2 Make travel arrangements
3 Prepare travel expense vouchers
4 Schedule appointments or meetings
5 Maintain appointment book
6 Prepare daily schedule of appointments
7 Cancel and reschedule appointments or meetings
8 Make arrangements for meetings
9 Prepare and distribute minutes of meeting
10 Arrange conferences
11 Review technical journals for articles of interest
12 Maintain appointments and meeting schedules on computer
13 Notarize documents

DUTY D: Receiving Visitors, Patients or Clients

TASKS:
1 Receive visitors or clients
2 Introduce visitors or clients

3 Maintain log of visitors or clients
4 Explain schedule changes to waiting visitors or clients

DUTY E: Performing Telecommunications Activities

TASKS: 1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Maintain telephone listings on computer or word processor
5 Record outgoing long distance telephone calls

DUTY F: Maintaining Office Supplies and Forms

TASKS: 1 Equip desk with office supplies and office forms
2 Order supplies and forms for office
3 Receive office supplies and forms
4 Store office supplies and forms
5 Issue office supplies and forms
6 Prepare office supply and office form inventory records manually
7 Process office supply and office form inventory reports on computer or word processor

DUTY G: Maintaining Office Equipment

TASKS: 1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment
6 Place service calls for office equipment
7 Schedule office equipment for routine maintenance
8 Recommend purchase or lease of office equipment
9 Order office equipment
10 Receive office equipment
11 Inventory office equipment
12 Process office equipment repair records manually

DUTY H: Organizing and Planning

TASKS: 1 Schedule custodial and maintenance services
2 Maintain professional reference library
3 Expedite charitable and civic contributions
4 Plan office layout and workflow
5 Prioritize work
6 Maintain the reception room

DUTY I: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Verify calculations made by others
4 Put up bulletin board display
5 Clean and straighten up work area

DUTY J: Filing Materials Manually

TASKS:
1 Establish manual filing system
2 Establish cross referencing system
3 Establish file index system
4 Establish file checkout system
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Retrieve materials from files
9 Retrieve materials stored on microfilm or microfiche
10 Secure classified or confidential files
11 Locate misfiles
12 Establish record retention policies
13 Transfer materials to inactive files
14 Purge files
15 Update cross referencing system and file index system
16 Revise file checkout system
17 Update filing system and files
18 Code materials for filing
19 Sort materials for alphabetic filing
20 Sort materials for numeric filing
21 Sort materials for subject filing
22 Arrange for filing of special materials

DUTY K: Taking and Transcribing Dictation

TASKS:
1 Take dictation using shorthand
2 Transcribe shorthand dictation
3 Transcribe dictation from recorded media

DUTY L: Supervising and Training

TASKS:
1 Interview applicants for employment
2 Maintain personnel records
3 Orient new employees
4 Assign work to others
5 Prepare employee evaluation reports
6 Evaluate work methods and procedures

DUTY M: Preparing Written Communications

TASKS:
1 Compile information for reports or correspondence
2 Compose correspondence

3 Compose reports
4 Edit documents
5 Prepare office manuals
6 Prepare graphic materials manually
7 Prepare newspaper ads
8 Prepare news releases
9 Prepare and send cablegrams, telegrams and mailgrams

DUTY N: Performing Financial Activities

TASKS:
1 Process charge slips
2 Prepare itemized bills, invoices or statements manually
3 Process payments manually
4 Reconcile cash count with payments
5 Prepare bank deposits
6 Process overdue accounts
7 Process accounts payable invoices manually
8 Process vouchers for payment manually
9 Make journal entries manually
10 Control petty cash fund
11 Prepare payroll using calculator
12 Prepare financial statements using calculator
13 Reconcile bank statements
14 Prepare payment vouchers on computer
15 Process accounts receivable on computer
16 Prepare quarterly tax reports

DUTY O: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Key mailing labels and envelopes
5 Input documents using optical character recognition equipment
6 Input data into spreadsheet formats
7 Input data into graphs and charts
8 Input records into data base files
9 Prepare backup files
10 Create glossary file
11 Store repetitive material
12 Update spelling dictionary
13 Input data from source documents
14 Store documents on diskettes

DUTY P: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content, and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files

6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Add new records to file
9 Update existing records in files
10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files, or records from storage
14 Copy one diskette to another
15 Assemble documents from stored text
16 Maintain backup files
17 Process text and data using integrated software

DUTY Q: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed paper
2 Print documents or reports using single-sheet paper
3 Print information according to sort criteria
4 Transmit documents or reports via modem
5 Receive documents or reports via modem
6 Transmit communications using an electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electronic mail
8 Print mailing labels or envelopes

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type income tax returns
12 Type legal documents

DUTY B: Processing Mail

TASKS:
1 Process incoming mail
2 Maintain mail distribution list
3 Forward mail
4 Process outgoing mail
5 Prepare packages for shipping
6 Prepare specialized mail such as registered, certified or insured mail
7 Maintain mailing list manually
8 Maintain mailing list on computer or word processor
9 Process bulk mailing

DUTY C: Coordinating and Performing Activites for Employer

TASKS:
1 Make notes on employer's mail
2 Make travel arrangements
3 Prepare travel expense vouchers
4 Schedule appointments or meetings
5 Maintain appointment book
6 Prepare daily schedule of appointments
7 Cancel and reschedule appointments or meetings
8 Make arrangements for meetings
9 Prepare and distribute minutes of meeting
10 Arrange conferences
11 Notarize documents
12 Maintain appointments and meeting schedules on computer
13 Schedule court hearings
14 Review technical journals for articles of interest

DUTY D: Receiving Visitors, Patients or Clients

TASKS:
1 Receive visitors or clients
2 Introduce visitors or clients
3 Maintain log of visitors or clients
4 Explain schedule changes to waiting visitors or clients

DUTY E: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Record outgoing long distance telephone calls
5 Maintain telephone listings on computer or word processor

DUTY F: Maintaining Office Supplies and Forms

TASKS:
1 Equip desk with office supplies and office forms
2 Order supplies and forms for office
3 Receive office supplies and forms
4 Store office supplies and forms
5 Issue office supplies and forms
6 Prepare office supply and office form inventory records manually
7 Process office supply and office form inventory reports on computer or word processor

DUTY G: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment
6 Place service calls for office equipment
7 Schedule office equipment for routine maintenance
8 Recommend purchase or lease of office equipment
9 Order office equipment
10 Receive office equipment
11 Inventory office equipment
12 Process office equipment repair records manually

DUTY H: Organizing and Planning

TASKS:
1 Schedule custodial and maintenance services
2 Maintain professional reference library
3 Plan office layout and workflow
4 Prioritize work
5 Maintain the reception room
6 Expedite charitable and civic contributions

DUTY I: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents

3 Verify calculations made by others
4 Clean and straighten up work area
5 Label exhibits presented in court
6 Put up bulletin board display

DUTY J: Filing Materials Manually

TASKS: 1 Establish manual filing system
2 Establish cross referencing system
3 Establish file index system
4 Establish file checkout system
5 File materials using alphabetic filing system
6 File materials using numeric filing system
7 File materials using subject filing system
8 Retrieve materials from files
9 Retrieve materials stored on microfilm or microfiche
10 Secure classified or confidential files
11 Locate misfiles
12 Establish record retention policies
13 Transfer materials to inactive files
14 Purge files
15 Update cross referencing system and file index system
16 Revise file checkout system
17 Update filing system and files
18 Arrange for filing of special material
19 Code materials for filing
20 Sort materials for alphabetical filing
21 Sort material for numeric filing
22 Sort material for subject filing

DUTY K: Taking and Transcribing Dictation

TASKS: 1 Take dictation using shorthand
2 Transcribe shorthand dication
3 Transcribe dictation from recorded media
4 Take legal dictation and transcribe legal documents

DUTY L: Supervising and Training

1 Orient new employees
2 Assign work to others
3 Evaluate work methods and procedures
4 Maintain personnel records

DUTY M: Preparing Written Communications

TASKS: 1 Compile information for reports or correspondence
2 Compose correspondence
3 Compose reports
4 Edit documents
5 Prepare office manuals
6 Prepare and send cablegrams, telegrams and mailgrams

DUTY N: Performing Financial Activities

TASKS:
1 Process charge slips
2 Prepare itemized bills, invoices or statements manually
3 Process payments manually
4 Reconcile cash count with payments
5 Prepare bank deposits
6 Process overdue accounts
7 Process accounts payable invoices manually
8 Process vouchers for payment manually
9 Make journal entries manually
10 Post entries from journals to ledgers manually
11 Control petty cash fund
12 Prepare payroll using calculator
13 Prepare financial statements using calculator
14 Reconcile bank statements
15 Prepare quarterly tax reports
16 Prepare payment vouchers on computer
17 Process accounts receivable on computer
18 Maintain fee schedule manually
19 Maintain fee schedule on computer or word processor

DUTY O: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Key mailing labels and envelopes
5 Input documents using optical character recognition equipment
6 Input data into spreadsheet formats
7 Input data into graphs and charts
8 Input records into data base files
9 Prepare backup files
10 Create glossary file
11 Store repetitive material
12 Update spelling dictionary
13 Input data from source documents
14 Store documents on diskettes

DUTY P: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Add new records to files
9 Update existing records in files

10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files or records from storage
14 Copy one diskette to another
15 Assemble documents from stored text
16 Maintain backup files
17 Process text and data using integrated software

DUTY Q: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed paper
2 Print documents or reports using single-sheet paper
3 Print information according to sort criteria
4 Transmit documents or reports via modem
5 Receive documents or reports via modem
6 Transmit communications using electronic bulletin board or electronic mail
7 Print mailing labels or envelopes

DUTY R: Preparing Court Documents

TASKS:
1 Prepare adoption papers
2 Prepare affidavits
3 Prepare affidavits for motions and notices
4 Prepare answers
5 Prepare papers for bankruptcy
6 Prepare briefs
7 Prepare complaints on pre-printed forms
8 Prepare complaints from sample forms
9 Prepare complaints from dictation
10 Prepare answers and counterclaims
11 Prepare answers and cross-claims
12 Take depositions
13 Prepare restraining orders (injunctions)
14 Prepare judgments
15 Prepare motions
16 Prepare motions and notices
17 Prepare public notices
18 Prepare orders
19 Prepare petitions from dictation
20 Prepare petitions from sample forms
21 Prepare subpoenas
22 Prepare summons
23 Prepare petitions and certificates for dissolution of marriage
24 Prepare findings of facts and decrees for dissolution of marriage
25 Prepare papers for probate court
26 Prepare final settlements of estates
27 Prepare papers for child support

DUTY S: Preparing Client Documents

TASKS:
1 Prepare agreements
2 Prepare bills of sale
3 Prepare codicils
4 Prepare contracts from dictation
5 Prepare contracts on pre-printed forms
6 Prepare deeds from dictation
7 Prepare deeds on pre-printed forms
8 Prepare leases from dictation
9 Prepare leases on pre-printed forms
10 Prepare mortgages from dictation
11 Prepare mortgages on pre-printed forms
12 Prepare chattel mortgages on pre-printed forms
13 Prepare promissory notes from dictation
14 Prepare promissory notes on pre-printed forms
15 Prepare powers of attorney from dictation
16 Prepare powers of attorney on pre-printed forms
17 Prepare wills
18 Prepare articles of incorporation
19 Prepare corporation minute books

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type birth record
12 Type death record

DUTY B: Processing Mail

TASKS:
1 Process incoming mail
2 Maintain mail distribution list
3 Forward mail
4 Process outgoing mail
5 Prepare packages for shipping
6 Prepare specialized mail such as registered, certified or insured mail
7 Maintain mailing list manually
8 Maintain mailing list on computer or word processor
9 Process bulk mailing

DUTY C: Coordinating and Performing Activities for Employer

TASKS:
1 Make notes on employer's mail
2 Make travel arrangements
3 Prepare travel expense vouchers
4 Schedule appointments or meetings
5 Maintain appointment book
6 Prepare daily schedule of appointments
7 Cancel and reschedule appointments or meetings
8 Make arrangements for meetings
9 Prepare and distribute minutes of meeting
10 Arrange conferences
11 Maintain appointments and meeting schedules on computer
12 Schedule hospital admission, ancillary testing, out-patient surgery, or referral to colleagues for patients
13 Review technical journals for articles of interest
14 Notarize documents

DUTY D: Receiving Visitors, Patients or Clients

TASKS:
1 Receive visitors, patients or clients

2 Introduce visitors, patients or clients
3 Explain schedule changes to waiting visitors, patients or clients
4 Register new patients
5 Maintain a log of visitors, patients or clients

DUTY E: Performing Telecommunications Activities

TASKS: 1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Record outgoing long distance telephone calls
5 Maintain telephone listings on computer or word processor

DUTY F: Maintaining Office Supplies and Forms

TASKS: 1 Equip desk with office supplies and forms
2 Order supplies and forms for office
3 Receive office supplies and forms
4 Store office supplies and forms
5 Issue office supplies and forms
6 Receive medical supplies and medications
7 Prepare office supply and office form inventory records manually
8 Process office supply and office form inventory reports on computer or word processor
9 Store medical supplies and medications

DUTY G: Maintaining Office Equipment

TASKS: 1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment
6 Place service calls for office equipment
7 Schedule office equipment for routine maintenance
8 Order office equipment
9 Receive office equipment
10 Recommend purchase or lease of office equipment
11 Inventory office equipment
12 Process office equipment repair records manually

DUTY H: Organizing and Planning

TASKS: 1 Plan office layout and workflow
2 Prioritize work
3 Maintain the reception room
4 Schedule custodial and maintenance services

5 Maintain professional reference library
6 Expedite charitable and civic contributions

DUTY I: Performing Clerical Activities

TASKS: 1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Verify calculations made by others
4 Put up bulletin board display
5 Clean and straighten up work area

DUTY J: Filing Materials Manually

TASKS: 1 Establish manual filing system
2 Establish cross referencing system
3 Establish file index system
4 Establish file checkout system
5 File materials using an alphabetic filing system
6 File materials using a numeric filing system
7 File materials using a subject filing system
8 Retrieve materials from files
9 Retrieve materials stored on microfilm or microfiche
10 Secure classified or confidential files
11 Locate misfiles
12 Establish record retention policies
13 Transfer materials to inactive files
14 Purge files
15 Update cross referencing system and file index system
16 Revise file checkout system
17 Update filing system and files
18 Arrange for filing of special materials
19 Code materials for filing
20 Sort materials for alphabetical filing
21 Sort materials for numeric filing
22 Sort material for subject filing

DUTY K: Taking and Transcribing Dictation

TASKS: 1 Take dictation using shorthand
2 Transcribe shorthand dictation
3 Transcribe dictation from recorded media
4 Take medical dictation and transcribe medical documents

DUTY L: Supervising and Training

TASKS: 1 Maintain personnel records
2 Orient new employees
3 Assign work to others
4 Evaluate work methods and procedures

DUTY M: Preparing Written Communications

TASKS:
1 Compile information for reports or correspondence
2 Compose correspondence
3 Compose reports
4 Edit documents
5 Prepare office manuals
6 Prepare and send cablegrams, telegrams and mailgrams

DUTY N: Performing Financial Activities

TASKS:
1 Process charge slips
2 Prepare itemized bills, invoices or statements manually
3 Process payments manually
4 Reconcile cash count with payments
5 Prepare bank deposits
6 Process overdue accounts
7 Process accounts payable invoices manually
8 Make journal entries manually
9 Control petty cash fund
10 Prepare payroll using calculator
11 Prepare financial statements using calculator
12 Process vouchers for payment manually
13 Post entries from journals to ledgers manually
14 Reconcile bank statements

DUTY O: Inputting and Storing Documents and Files

TASKS:
1 Key documents from longhand or edited rough draft
2 Key documents from machine transcription
3 Key mailing labels and envelopes
4 Input documents using optical character recognition equipment
5 Input data into spreadsheet formats
6 Store repetitive material
7 Input data from source documents
8 Input records into data base files
9 Initialize diskettes
10 Store documents on diskettes
11 Update spelling dictionary
12 Prepare backup files
13 Create glossary file

DUTY P: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents

8 Add new record to files
9 Update existing records in files
10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files or records from storage
14 Assemble documents from stored text
15 Maintain backup files
16 Process text and data using integrated software
17 Copy one diskette to another

DUTY Q: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using continuous-feed paper
2 Print documents or reports using single-sheet paper
3 Print information according to sort criteria
4 Receive documents or reports via modem
5 Transmit communications using electronic bulletin board or electronic mail
6 Print mailing labels or envelopes
7 Transit documents or reports via modem

DUTY R: Preparing Medical Records and Insurance Forms

TASKS:
1 Assist patients to complete registration forms
2 Type medical information such as history, notes, clinical resumes and reports into medical records
3 Process out-of office examination or treatment information
4 Code diagnoses and surgical procedures
5 Transcribe codings from clinical records
6 Review medical records for completeness and accuracy
7 Complete commercial insurance claim forms
8 Complete Medicare payment request forms
9 Complete Medicaid claim forms
10 Complete worker's compensation claim forms
11 Complete disability claim forms

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

GENERAL OFFICE CLERK CLUSTER

Receptionist

Typist

*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

GENERAL OFFICE CLERK CLUSTER MATRIX

R = Receptionist
T = Typist

TYPEWRITING

	R	T
1 Type forms	X	X
2 Type offset masters		X
3 Maintain all hard copy files and records		X
4 Type from longhand or edited rough draft copy	X	X
5 Type letters	X	X
6 Type memos	X	X
7 Type tables	X	X
8 Type manuscripts	X	X
9 Type technical reports	X	X
10 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography	X	X
11 Type outlines	X	X
12 Type information on cards such as postal cards, index cards, file cards or address-finder cards	X	X
13 Type labels such as address labels, file folder labels or file drawer labels	X	X
14 Transcribe dictation from recorded media	X	X

PERFORMING TELECOMMUNICATIONS ACTIVITIES

	R	T
1 Process incoming telephone calls	X	X
2 Process incoming switchboard calls	X	
3 Process outgoing telephone calls	X	X
4 Process outgoing switchboard calls	X	
5 Record outgoing long distance telephone calls	X	X
6 Record outgoing long distance switchboard calls	X	
7 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers	X	X
8 Maintain telephone listings on computer or word processor	X	X
9 Take messages and get them to the correct employee	X	X

MAINTAINING OFFICE EQUIPMENT

	R	T
1 Change office equipment ribbons	X	X
2 Clean office equipment	X	X
3 Perform maintenance functions on photocopier such as changing toner and replacing paper	X	X
4 Repair minor office equipment malfunctions	X	X
5 Recommend service on office equipment	X	X

PERFORMING CLERICAL ACTIVITIES

	R	T
1 Duplicate materials on photocopying machine	X	X
2 Collate and bind documents	X	X
3 Put up bulletin board display	X	X
4 Clean and straighten up work area	X	X
5 Verify calculations made by others	X	X
6 Equip desk with office supplies and office forms	X	X

FILING MATERIALS MANUALLY

		R	T
1	Code materials for filing	X	X
2	Sort materials for alphabetic filing	X	X
3	Sort materials for numeric filing	X	X
4	Sort materials for subject filing	X	X
5	File materials using alphabetic filing	X	X
6	File materials using numeric filing	X	X
7	File materials using subject filing	X	X
8	Retreive materials from files	X	X
9	Retreive materials stored on microfilm or microfiche	X	X
10	Locate misfiles	X	X
11	Transfer materials to inactive files	X	X
12	Purge files	X	X

ORGANIZING AND PLANNING

		R	T
1	Expedite charitable and civic contributions	X	
2	Prioritize work	X	X

INPUTTING AND STORING DOCUMENTS AND FILES

		R	T
1	Initialize diskettes	X	X
2	Key documents from longhand or edited rough draft	X	X
3	Key documents from machine transcription	X	X
4	Prepare backup files	X	X
5	Store documents on diskettes	X	X
6	Key mailing labels and envelopes		X
7	Input data into spreadsheet formats		X
8	Input data into graphs and charts		X
9	Input records into data base files		X
10	Create glossary file		X
11	Store repetitive material		X
12	Update spelling dictionary		X

EDITING AND CORRECTING DOCUMENTS, RECORDS AND FILES

		R	T
1	Process text and data using integrated software	X	X
2	Proofread documents for format, content and typographical errors	X	X
3	Move (rearrange) text	X	X
4	Search and replace text	X	X
5	Insert text	X	X
6	Rename files	X	X
7	Insert end-of-line hyphens into text	X	X
8	Prepare new document from existing documents	X	X
9	Add new records to files	X	X
10	Update existing records in files	X	X
11	Revise stored repetitive material	X	X
12	Verify data and correct errors	X	X
13	Delete text, files or records from storage	X	X
14	Copy one diskette to another	X	X
15	Assemble documents from stored text	X	X
16	Maintain backup files	X	X
17	Update data on spreadsheets		X

PRINTING, DISTRIBUTING AND RECEIVING OUTPUT

	R	T
1 Transmit documents or reports via modem		X
2 Receive documents or reports via modem		X
3 Transmit communications using electronic bulletin board or electronic mail		X
4 Print documents or reports using single-sheet paper	X	X
5 Print information according to sort criteria	X	X
6 Print mailing labels or envelopes	X	X
7 Monitor electronic bulletin board or electric mail		X

PROCESSING MAIL

	R	T
1 Process incoming mail	X	
2 Maintain mail distribution list	X	
3 Forward mail	X	
4 Process outgoing mail	X	
5 Process bulk mailing	X	
6 Prepare packages for shipping	X	
7 Prepare specialized mail such as registered, certified or insured mail	X	
8 Maintain mailing list manually	X	
9 Maintain mailing list on computer or word processor	X	

COORDINATING AND PERFORMING ACTIVITIES FOR EMPLOYER

	R	T
1 Schedule appointments or meetings	X	
2 Maintain appointment book	X	
3 Prepare daily schedule of appointments	X	
4 Cancel and reschedule appointments or meetings	X	
5 Make arrangements for meetings	X	
6 Call telephone repair service	X	
7 Page employees	X	
8 Deal with irate phone calls	X	

RECEIVING VISITORS, PATIENTS OR CLIENTS

	R	T
1 Receive visitors, patients, or clients	X	
2 Introduce visitors or clients	X	
3 Maintain a log of visitors	X	
4 Explain schedule changes to waiting visitors, patients or clients	X	
5 Give directions to location	X	

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

RECEPTIONIST

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Transcribe dictation from recorded media
12 Type forms

DUTY B: Processing Mail

TASKS:
1 Process incoming mail
2 Maintain mail distribution list
3 Forward mail
4 Process outgoing mail
5 Process bulk mailing
6 Prepare packages for shipping
7 Prepare specialized mail such as registered, certified or insured mail
8 Maintain mailing list manually
9 Maintain mailing list on computer or word processor

DUTY C: Coordinating and Performing Activities for Employer

TASKS:
1 Schedule appointments or meetings
2 Maintain appointment book
3 Prepare daily schedule of appointments
4 Cancel and reschedule appointments or meetings
5 Make arrangements for meetings
6 Call telephone repair service
7 Page employees
8 Deal with irate phone calls

DUTY D: Receiving Visitors, Patients or Clients

TASKS:
1 Receive visitors, patients, or clients
2 Introduce visitors or clients
3 Maintain log of visitors
4 Explain schedule changes to waiting visitors, patients or clients
5 Give directions to location

DUTY E: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls

2 Process incoming switchboard calls
3 Process outgoing telephone calls
4 Process outgoing switchboard calls
5 Record outgoing long distance telephone calls
6 Record outgoing long distance switchboard calls
7 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
8 Maintain telephone listings on computer or word processor
9 Take messages and get them to the correct employee

DUTY F: Maintaining Office Equipment

TASKS: 1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment

DUTY G: Organizing and Planning

TASKS: 1 Expedite charitable and civic contributions
2 Prioritize work

DUTY H: Performing Clerical Activities

TASKS: 1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Put up bulletin board display
4 Clean and straighten up work area
5 Verify calculations made by others
6 Equip desk with office supplies and office forms

DUTY I: Filing Materials Manually

TASKS: 1 File materials using numeric filing system
2 File materials using subject filing system
3 File materials using alphabetic filing system
4 Retrieve materials from files
5 Retrieve materials stored on microfilm or microfiche
6 Locate misfiles
7 Transfer materials to inactive files
8 Purge files
9 Code materials for filing
10 Sort materials for alphabetic filing
11 Sort materials for numeric filing
12 Sort materials for subject filing

DUTY J: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Prepare backup files
5 Store documents on diskettes

DUTY K: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Add new records to files
9 Update existing records in files
10 Revise stored repetitive material
11 Verify data and correct errors
12 Delete text, files or records from storage
13 Copy one diskette to another
14 Assemble documents from stored text
15 Maintain backup files
16 Process text and data using software

DUTY L: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using single-sheet paper
2 Print information according to sort criteria
3 Print mailing labels or envelopes

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Typewriting

TASKS:
1 Type from longhand or edited rough draft copy
2 Type letters
3 Type memos
4 Type tables
5 Type manuscripts
6 Type technical reports
7 Type special pages for manuscripts or reports such as cover page, table of contents or bibliography
8 Type outlines
9 Type information on cards such as postal cards, index cards, file cards or address-finder cards
10 Type labels such as address labels, file folder labels or file drawer labels
11 Type offset masters
12 Transcribe dictation from recorded media
13 Maintain all hard copy files and records
14 Type forms

DUTY B: Performing Telecommunications Activities

TASKS:
1 Process incoming telephone calls
2 Process outgoing telephone calls
3 Maintain lists of telephone numbers such as numbers frequently called, emergency numbers or employee extension numbers
4 Maintain telephone listings on computer or word processor
5 Take messages and get them to correct employee
6 Record outgoing long distance telephone calls

DUTY C: Maintaining Office Equipment

TASKS:
1 Change office equipment ribbons
2 Clean office equipment
3 Perform maintenance functions on photocopier such as changing toner and replacing paper
4 Repair minor office equipment malfunctions
5 Recommend service on office equipment

DUTY D: Performing Clerical Activities

TASKS:
1 Duplicate materials on photocopying machine
2 Collate and bind documents
3 Verify calculations made by others
4 Clean and straighten up work area
5 Equip desk with office supplies and office forms
6 Put up bulletin board display

DUTY E: Filing Materials Manually

TASKS:
1 Code materials for filing
2 Sort materials for alphabetic filing
3 Sort materials for numeric filing
4 Sort materials for subject filing
5 File materials using alphabetic filing
6 File materials using numeric filing
7 File materials using subject filing
8 Retreive materials from files
9 Retreive materials stored on microfilm or microfiche
10 Locate misfiles
11 Transfer materials to inactive files
12 Purge files

DUTY F: Organizing and Planning

TASKS:
1 Prioritize work

DUTY G: Inputting and Storing Documents and Files

TASKS:
1 Initialize diskettes
2 Key documents from longhand or edited rough draft
3 Key documents from machine transcription
4 Key mailing labels and envelopes
5 Input data into spreadsheet formats
6 Input data into graphs and charts
7 Input records into data base files
8 Prepare backup files
9 Create glossary file
10 Store repetitive material
11 Update spelling dictionary
12 Store documents on diskettes

DUTY H: Editing and Correcting Documents, Records and Files

TASKS:
1 Proofread documents for format, content and typographical errors
2 Move (rearrange) text
3 Search and replace text
4 Insert text
5 Rename files
6 Insert end-of-line hyphens into text
7 Prepare new document from existing documents
8 Add new records to files
9 Update existing records in files
10 Update data on spreadsheets
11 Revise stored repetitive material
12 Verify data and correct errors
13 Delete text, files or records from storage
14 Copy one diskette to another
15 Maintain backup files
16 Process text and data using integrated software

17 Assemble documents from stored text

DUTY I: Printing, Distributing and Receiving Output

TASKS:
1 Print documents or reports using single-sheet paper
2 Print information according to sort criteria
3 Transmit documents or reports via modem
4 Receive documents or reports via modem
5 Print mailing labels or envelopes
6 Transmit communications using electronic bulletin board or electronic mail
7 Monitor electronic bulletin board or electric mail

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

PRODUCT ORIENTED MARKETING CLUSTER

Sales Clerk
Salesperson, General Merchandise
Salesperson, Women's Apparel and Accessories
Salesperson, Infants' and Children's Wear
Salesperson, Men's and Boys' Wear
Salesperson, Automobile Accessories
Stock Clerk, Self-Service Store
Cashier 1
Cashier 11
Cashier/Checker
*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

PRODUCT ORIENTED MARKETING CLUSTER MATRIX

SC = Sales Clerk
SG = Salesperson, General Merchandise
SW = Salesperson, Women's Apparel and Accessories
SI = Salesperson, Infants' and Children's Wear
SM = Salesperson, Men's and Boys' Wear
SA = Salesperson, Automobile Accessories
SS = Stock Clerk, Self-Service Store
C1 = Cashier I
C2 = Cashier II
CC = Cashier/Checker

SELLING MERCHANDISE

		SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1	Determine customer needs, wants, and problems	X	X	X	X	X	X			X	X
2	Determine availability of merchandise using computer terminal	X	X				X				
3	Locate merchandise for customer	X	X	X	X	X	X			X	X
4	Demonstrate product use and care	X	X				X				
5	Present product features and benefits to overcome customer objections	X	X	X	X	X	X				
6	Sell related products such as accessories	X	X	X	X	X					
7	Sell alternative merchandise when desired product is not available	X	X	X	X	X					X
8	Sell larger quantities of merchandise	X	X	X	X	X					
9	Suggest catalog sales when item is not carried in store	X	X	X	X	X	X				
10	Inform customer of special promotions	X	X	X	X	X	X				X
11	Process mail orders for merchandise	X	X	X	X	X					X
12	Stimulate repeat business	X	X	X	X	X	X				X
13	Develop mailing lists	X	X	X	X	X	X				
14	Follow up with customers	X	X	X	X	X	X				
15	Show customer variety of styles			X	X	X					
16	Show customer benefits of garment			X	X	X					
17	Show customer signs of quality construction in apparel			X	X	X					
18	Provide information to customer on types of fabric used in garment			X	X	X					
19	Provide information to customer on special finishes on garment fabric			X	X	X					
20	Provide information to customer on any guarantees on clothing			X	X	X					
21	Provide information on garment care to customer			X	X	X					
22	Mark garments for alteration			X	X	X					
23	Show customer fashionable ways to accessorize garments			X	X	X					
24	Greet customer	X	X	X	X	X	X				
25	Close sale	X	X	X	X	X	X				
26	Process telephone orders for merchandise	X	X	X	X	X	X				
27	Locate automotive accessories on selling floor						X				
28	Locate automotive accessories in catalogs						X				
29	Locate automotive accessories using microfiche system						X				

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
30 Sell merchandise related to automotive electrical system						X				
31 Sell merchandise related to automotive carburetion and fuel systems						X				
32 Sell merchandise related to automotive heating, cooling, exhaust and emission systems						X				
33 Sell merchandise related to automotive suspension, steering and braking systems						X				
34 Sell automotive replacement merchandise such as belts, filters and windshield wiper blades						X				
35 Sell merchandise to maintain the interior and exterior appearance of vehicle						X				
36 Sell automotive-related merchandise such as car top carriers, trailers, jacks and tools						X				
37 Sell tickets for events using ticket dispensing machine									X	
38 Sell tickets for events using computerized system									X	
39 Sell gift certificates									X	
40 Provide information on events or merchandise such as quality, special features, benefits and guarantees									X	X
41 Process mail orders for tickets									X	X
42 Sell tickets for alternative events or alternative merchandise									X	

PERFORMING SALES-RELATED ACTIVITIES

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1 Open store or department	X	X	X	X	X	X				
2 Process cash or check sales transaction using electric cash register	X	X	X	X	X	X			X	X
3 Process cash or check sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X
4 Process cash or check sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				X
5 Process debit card sales transaction using electric cash register	X	X	X	X	X	X			X	X
6 Process debit card sales transaction using electronic point-of-sale register	X	X	X	X	X	X			X	X
7 Process debit card sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				X
8 Process bank credit card sales transaction using electric cash register	X	X	X	X	X	X			X	X
9 Process bank credit card sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X
10 Process bank credit card sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				X
11 Calculate cash discounts						X				
12 Process store charge sales transaction using electric cash register	X	X	X	X	X	X			X	X
13 Process store charge sales transaction using electronic point-of-sale cash register	X	X	X	X	X	X			X	X

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
14 Process store charge sales transaction using optical scanning equipment attached to cash register	X	X	X	X	X	X				
15 Secure merchandise while in storage area or stockroom							X			
16 Process installment credit sale		X	X	X	X	X				
17 Secure customer credit information		X	X	X	X	X				
18 Package customer's purchase	X	X	X	X	X	X	X			X
19 Gift wrap merchandise	X	X	X	X	X					X
20 Process customer complaint	X	X	X	X	X	X	X	X	X	X
21 Close out cash register	X	X	X	X	X	X		X	X	X
22 Prepare sales slip	X	X	X	X	X	X				X
23 Close store or department	X	X	X	X	X	X				
24 Detect and report shoplifting	X	X	X	X	X	X	X	X	X	X
25 Detect and report counterfeit currency	X	X	X	X	X	X		X	X	X
26 Change cash register tape	X	X	X	X	X	X		X	X	X
27 Report employee pilferage	X	X	X	X	X	X	X	X	X	X
28 Detect and report fraudulent credit card	X	X	X	X	X	X		X	X	X
29 Detect and report fraudulent check	X	X	X	X	X	X		X	X	X
30 Process customer returns that are possible scams	X	X	X	X	X	X			X	X
31 Follow procedures for conduct during and after robbery	X	X	X	X	X	X	X	X	X	X
32 Call manufacturers to check on orders	X	X	X	X	X	X				
33 Write initial raincheck	X	X	X	X	X	X				
34 Process sales and returns with discounts such as employee or senior citizen discounts	X	X	X	X	X	X			X	X
35 Measure customer for clothing			X	X	X					
36 Restore fabric snags			X	X	X					
37 Process foster children's saleschecks				X						
38 Process children's homes saleschecks				X						
39 Assist non-profit organizations with their sales			X	X	X					
40 Arrange for donation of shopworn merchandise to local agencies			X	X	X					
41 Process customer's exchange	X	X	X	X	X				X	
42 Process customer's cash refund for returned merchandise	X	X	X	X	X				X	
43 Process charge credit for returned merchandise	X	X	X	X	X				X	
44 Process lay-away sale	X	X	X	X	X					
45 Process coupon sales transaction	X	X	X	X	X					
46 Process gift certificate sales transaction	X	X	X	X	X			X	X	X
47 Process rain check sales transaction	X	X	X	X	X				X	X
48 Respond to customer complaint	X	X	X	X	X					
49 Requisition supplies such as saleschecks/ packaging supplies	X	X	X	X	X					
50 Weigh items on electronic scale	X	X								X
51 Process customer through cafeteria checkout									X	
52 Correct cash register errors	X	X	X	X	X	X				X

RECEIVING AND STORING INCOMING MERCHANDISE

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1 Assist carrier unload (off-load) merchandise							X			
2 Check invoice against purchase order							X			

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
3 Check number of cartons against bill of lading, freight bill, or manifest							X			
4 Prepare overage, shortage, and discrepancy (OSD) report							X			
5 Inspect incoming cartons or containers for damage							X			
6 Deliver incoming shipment to storage or work area using hand truck							X			
7 Unpack incoming shipment							X			
8 Check unpacked merchandise against invoice or packing slip							X			
9 Inspect unpacked merchandise for damage							X			
10 Sort unpacked goods according to identification codes							X			
11 Store unpacked merchandise in bins, racks or shelves in stockroom							X			
12 Clean stockroom							X			

PERFORMING MERCHANDISING DUTIES

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1 Process incoming merchandise	X	X	X	X	X	X				X
2 Return damaged merchandise	X	X	X	X	X	X	X			X
3 Prepare merchandise for stock or immediate store display	X	X	X	X	X	X	X			X
4 Code and date stock	X	X	X	X	X	X	X			X
5 Price merchandise using ticketing machine	X	X	X	X	X	X	X			X
6 Price merchandise using price stamper	X	X				X	X			X
7 Price merchandise using gummed tags	X	X	X	X	X	X	X			X
8 Price merchandise using tie-on tickets	X	X	X	X	X		X			
9 Price merchandise using pin tickets	X	X	X	X	X		X			
10 Price merchandise using ticketing equipment with security tags	X	X	X	X	X	X	X			X
11 Take price markups or markdowns as designated	X	X	X	X	X	X	X			X
12 Take progressive markdowns on shopworn or damaged goods	X	X	X	X	X	X	X			X
13 Remove damaged, obsolete, or out-of-date merchandise from display or stock	X	X	X	X	X	X	X			X
14 Stock merchandise on shelves, counters, tables, racks or in display cases	X	X	X	X	X	X	X			X
15 Place price cards on shelves		X				X	X			X
16 Straighten merchandise on shelves, counters, tables, racks or in display cases	X	X	X	X	X	X	X			X
17 Clean shelves, counters, tables, or display cases	X	X	X	X	X	X	X			X
18 Rotate dated stock on shelves		X					X			
19 Pull and assemble merchandise for sales floor							X			
20 Deliver marked merchandise to the sales floor for display							X			
21 Check accuracy of stocked shelves							X			
22 Change price on merchandise	X	X	X	X	X					
23 Face shelves	X									
24 Take physical inventory of stock	X	X	X	X	X					
25 Steam badly wrinkled clothing			X	X	X					
26 Maintain alignment of racks	X	X	X	X	X					

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
27 Maintain fitting rooms			X	X	X					
28 Keep records of merchandise sold using ticket stubs	X	X	X	X	X					

PREPARING MERCHANDISE DISPLAY

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1 Assemble merchandise for display		X	X	X	X	X				X
2 Set up counter display	X	X	X	X	X	X	X			X
3 Set up manufacturer's display	X	X	X	X	X	X	X			X
4 Set up window display	X	X	X	X	X	X	X			X
5 Set up interior display	X	X	X	X	X	X				X
6 Set up end-of-aisle display	X	X	X	X	X	X	X			X
7 Set up display in display case	X	X	X	X	X	X	X			X
8 Set up table display	X	X	X	X	X	X	X			X
9 Dismantle merchandise display	X	X	X	X	X	X	X			X
10 Prepare point-of-sale sign or banner by hand	X	X	X	X	X	X				
11 Prepare point-of-sale sign or banner using sign press	X	X	X	X	X	X				
12 Set up advertised merchandise for sale	X	X	X	X	X	X	X			X
13 Dress mannequin	X	X	X	X	X					
14 Accessorize display merchandise	X	X	X	X	X					
15 Clean and straighten up display	X	X	X	X	X	X				
16 Set up advertising signs							X			

PERFORMING CLERICAL-RELATED ACTIVITIES

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1 Process telephone orders for merchandise	X	X	X	X	X	X				
2 Arrange for delivery of merchandise	X	X	X	X	X	X				
3 Process customer's exchange	X	X	X	X	X	X				
4 Process customer's cash refund for returned merchandise	X	X	X	X	X	X				
5 Process customer's charge credit for returned merchandise	X	X	X	X	X	X				
6 Process lay-away sale	X	X	X	X	X	X				
7 Process special order for merchandise	X	X	X	X	X	X				
8 Prepare gift certificate	X	X	X	X	X					
9 Redeem food stamps or promotional coupon	X	X	X	X	X	X		X	X	X
10 Process back order for merchandise	X	X	X	X	X	X				
11 Process store transfer of merchandise	X	X	X	X	X	X	X			
12 Prepare bank deposit	X	X	X	X	X	X		X	X	X
13 Requisition supplies such as saleschecks, cash register tapes and packaging supplies	X	X	X	X	X	X		X	X	X
14 Issue trading stamps	X	X	X	X	X					X
15 Redeem trading stamps	X	X	X	X	X					X
16 Conduct on-going physical inventory	X	X	X	X	X	X	X			
17 Conduct periodic physical inventory	X	X	X	X	X	X	X			
18 Prepare stock order forms							X			
19 Prepare stock record cards and bin tickets							X			
20 File stock record cards							X			
21 Process special order for merchandise							X			
22 Process clothing alteration paperwork			X	X	X					
23 Maintain a current clientele book or card file of customers			X	X	X					
24 Process store transfer of merchandise							X			
25 Cash checks								X	X	X

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
26 Issue credit memorandum for returned merchandise	X	X	X	X	X			X	X	
27 Prepare cash drawer for daily business	X	X	X	X	X			X	X	X
28 Process payments on accounts receivable using computerized system									X	
29 Balance cash drawer at end of day	X	X	X	X	X			X	X	X

PERFORMING ACCOUNTING-RELATED ACTIVITIES

	SC	SG	SW	SI	SM	SA	SS	C1	C2	CC
1 Process cash payment of account using bookkeeping machine								X		
2 Process cash payment of account using computerized system								X		
3 Process accounts paid by check using bookkeeping machine								X		
4 Process account as paid by check using computerized system								X		
5 Process account paid by credit card using bookkeeping machine								X		
6 Process account paid by credit card using computerized system								X		
7 Process pre-payment of account using bookkeeping machine								X		
8 Process pre-payment of account using computerized system								X		
9 Process vouchers for payment of company expenditures manually								X		
10 Process vouchers for payment of company expenditures using bookkeeping machine								X		
11 Process vouchers for payment of company expenditures using computerized system								X		
12 Reconcile bank statement								X		
13 Prepare collection and disbursement reports manually								X		
14 Prepare collection and disbursement reports using bookkeeping machine								X		
15 Prepare collection and disbursement reports using computerized system								X		
16 Post customer's charges using bookkeeping machine								X		
17 Post customer's charges using computerized system								X		
18 Balance daily debits and credits to accounts								X		

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS:
1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS:
1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

SALES CLERK

DUTY A: Selling Merchandise

TASKS:
1 Greet customer
2 Locate merchandise for customer
3 Close sale
4 Stimulate repeat business
5 Process mail orders for merchandise
6 Process telephone orders for merchandise
7 Determine customer needs, wants and problems
8 Determine availability of merchandise using computer terminal
9 Demonstrate product use and care
10 Present product features and benefits to overcome customer objections
11 Sell related products such as accessories
12 Sell alternative merchandise when desired product is not available
13 Sell larger quantities of merchandise
14 Suggest catalog sales when item is not carried in store
15 Inform customer of special promotions
16 Develop mailing lists
17 Follow up with customers

DUTY B: Performing Sales-Related Activities

TASKS:
1 Prepare sales slip
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of-sale cash register
4 Process cash or check sales transaction using optical scanning equipment attached to cash register
5 Process debit card sales transaction using electric cash register
6 Process debit card sales transaction using electronic point-of-sale cash register
7 Process debit card sales transaction using optical scanning equipment attached to cash register
8 Process bank credit card sales transaction using electric cash register
9 Process bank credit card sales transaction using electronic point-of-sale cash register
10 Process bank credit card sales transaction using optical scanning equipment attached to cash register
11 Process store charge sales transaction using electric cash register
12 Process store charge sales transaction using electronic point-of-sale cash register
13 Process store charge sales transaction using optical scanning equipment attached to cash register
14 Package customer's purchase
15 Process customer's exchange
16 Process customer's cash refund for returned merchandise
17 Process charge credit for returned merchandise
18 Process lay-away sale

19 Close out cash register
20 Process coupon sales transaction
21 Process gift certificate sales transaction
22 Process rain check sales transaction
23 Respond to customer complaint
24 Requisition supplies such as saleschecks/packaging supplies
25 Change cash register tape
26 Detect and report counterfeit currency
27 Report employee pilferage
28 Detect and report fraudulent credit card
29 Detect and report fraudulent check
30 Detect and report shoplifting
31 Weigh items on electronic scale
32 Gift wrap merchandise
33 Follow procedures for conduct during and after robbery
34 Open store or department
35 Process customer complaint
36 Detect and report shoplifting
37 Process customer returns that are possible scams
38 Call manufacturers to check on orders
39 Write initial raincheck
40 Process sales and returns with discounts such as employee or citizen discounts
41 Correct cash register errors

DUTY C: Performing Merchandising Duties

TASKS:
1 Process incoming merchandise
2 Price merchandise using price stamper
3 Price merchandise using ticketing machine
4 Change price on merchandise
5 Stock merchandise on shelves, counters, tables, racks or in display cases
6 Face shelves
7 Clean shelves, counters, tables, or display cases
8 Straighten merchandise on shelves, counters, tables, racks or display cases
9 Take physical inventory of stock
10 Keep record of merchandise sold using ticket stubs
11 Prepare merchandise for stock or immediate store display
12 Code and date stock
13 Price merchandise using gummed tags
14 Price merchandise using tie-on tickets
15 Price merchandise using pin tickets
16 Price merchandise using ticketing equipment with security tags
17 Take price markups or markdowns as designated by buyer
18 Remove damaged, obsolete or out-of-date merchandise from display or stock
19 Take progressive markdowns on shopworn or damaged goods
20 Return damaged merchandise
21 Maintain alignment of racks

DUTY D: Preparing Merchandise Display

TASKS:
1 Set up counter display
2 Set up manufacturer's display
3 Set up window display
4 Set up interior display
5 Set up end-of-aisle display
6 Set up display in display case
7 Clean and straighten up display
8 Dismantle merchandise display
9 Prepare point-of-sale sign or banner by hand
10 Prepare point-of-sale or banner using sign press
11 Set up table display
12 Set up advertised merchandise for sale
13 Dress mannequin
14 Accessorize display merchandise

DUTY E: Performing Clerical - Related Activities

TASKS:
1 Process telephone orders for merchandise
2 Arrange for delivery of merchandise
3 Process customer's exchange
4 Process customer's cash refund for returned merchandise
5 Process customer's charge credit for returned merchandise
6 Process lay-away sale
7 Process special order for merchandise
8 Prepare gift certificate
9 Redeem food stamps or promotional coupon
10 Process back order for merchandise
11 Process store transfer of merchandise
12 Prepare bank deposit
13 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
14 Issue trading stamps
15 Redeem trading stamps
16 Conduct on-going physical inventory
17 Conduct periodic physical inventory
18 Prepare cash drawer for daily business
19 Issue credit memorandum for returned merchandise
20 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

SALESPERSON, GENERAL MERCHANDISE

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants and problems
2 Determine availability of merchandise using computer terminal
3 Locate merchandise for customer
4 Demonstrate product use and care
5 Present product features and benefits to overcome customer objections
6 Sell related products such as accessories
7 Sell alternative merchandise when desired product is not available
8 Sell larger quantities of merchandise
9 Suggest catalog sales when item is not carried in store
10 Inform customer of special promotions
11 Process mail orders for merchandise
12 Stimulate repeat business
13 Develop mailing lists
14 Follow up with customers
15 Greet customer
16 Close sale
17 Process telephone orders for merchandise

DUTY B: Performing Sales-Related Activities

TASKS:
1 Open store or department
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of-sale cash register
4 Process cash or check sales transaction using optical scanning equipment attached to cash register
5 Process debit card sales transaction using electric cash register
6 Process debit card sales transaction using electronic point-of-sale cash register
7 Process debit card sales transaction using optical scanning equipment attached to cash register
8 Process bank credit card sales transaction using electric cash register
9 Process bank credit card sales transaction using electronic point-of-sale cash register
10 Process bank credit card sales transaction using optical scanning equipment attached to cash register
11 Process store charge sales transaction using electric cash register
12 Process store charge sales transaction using electronic point-of-sale cash register
13 Process store charge sales transaction using optical scanning equipment attached to cash register
14 Process installment credit sale
15 Secure customer credit information
16 Package customer's purchase
17 Gift wrap merchandise
18 Process customer complaint

19 Close out cash register
20 Prepare sales slip
21 Close store or department
22 Detect and report shoplifting
23 Detect and report counterfeit currency
24 Report employee pilferage
25 Detect and report fraudulent credit card
26 Detect and report fraudulent check
27 Process customer returns that are possible scams
28 Follow procedures for conduct during and after robbery
29 Call manufacturers to check on orders
30 Write initial raincheck
31 Process sales and returns with discounts such as employee or senior citizen discounts
32 Process customer's exchange
33 Process customer's cash refund for returned merchandise
34 Process charge credit for returned merchandise
35 Process lay-away sale
36 Process coupon sales transaction
37 Process gift certificate sales transaction
38 Process rain check sales transaction
39 Respond to customer complaint
40 Requisition supplies such as saleschecks/packaging supplies
41 Change cash register tape
42 Weigh items on electronic scale
43 Correct cash register errors

DUTY C: Performing Merchandising Duties

TASKS:
1 Process incoming merchandise
2 Return damaged merchandise
3 Prepare merchandise for stock or immediate store display
4 Code and date stock
5 Price merchandise using ticketing machine
6 Price merchandise using price stamper
7 Price merchandise using gummed tags
8 Price merchandise using tie-on tickets
9 Price merchandise using pin tickets
10 Price merchandise using ticketing equipment with security tags
11 Take price markups or markdowns as designated
12 Take progressive markdowns on shopworn or damaged goods
13 Remove damaged, obsolete, or out-of-date merchandise from display or stock
14 Stock merchandise on shelves, counters, tables, racks or in display cases
15 Place price cards on shelves
16 Straighten merchandise on shelves, counters, tables, racks or in display cases
17 Clean shelves, counters, tables, or display cases
18 Rotate dated stock on shelves
19 Change price on merchandise
20 Take physical inventory of stock
21 Maintain alignment of racks
22 Keep records of merchandise sold using ticket stubs

DUTY D: Preparing Merchandise Display

TASKS:
1 Assemble merchandise for display
2 Set up counter display
3 Set up manufacturer's display
4 Set up window display
5 Set up interior display
6 Set up end-of-aisle display
7 Set up display in display case
8 Set up table display
9 Dismantle merchandise display
10 Prepare point-of-sale sign or banner by hand
11 Prepare point-of-sale sign or banner using sign press
12 Set up advertised merchandise for sale
13 Clean and straighten up display
14 Accessorize display merchandise

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Process telephone orders for merchandise
2 Arrange for delivery of merchandise
3 Process customer's exchange
4 Process customer's cash refund for returned merchandise
5 Process customer's charge credit for returned merchandise
6 Process lay-away sale
7 Process special order for merchandise
8 Prepare gift certificate
9 Redeem food stamps or promotional coupon
10 Process back order for merchandise
11 Process store transfer of merchandise
12 Prepare bank deposit
13 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
14 Issue trading stamps
15 Redeem trading stamps
16 Conduct on-going physical inventory
17 Conduct periodic physical inventory
18 Issue credit memorandum for returned merchandise
19 Prepare cash drawer for daily business
20 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

SALESPERSON, WOMEN'S APPAREL AND ACCESSORIES

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants, and problems
2 Locate merchandise for customer
3 Show customer variety of styles
4 Show customer benefits of garment
5 Show customer signs of quality construction in apparel
6 Provide information to customer on the types of fabric used in garment
7 Provide information to customer on special finishes on garment fabric
8 Provide information to customer on any guarantees on clothing
9 Provide information on garment care to customer
10 Sell related products such as accessories
11 Sell alternative merchandise when desired product is not available
12 Suggest catalog sales when item is not carried in store
13 Sell larger quantities of merchandise
14 Inform customer of special promotions
15 Mark garments for alteration
16 Process mail orders for merchandise
17 Stimulate repeat business
18 Develop mailing lists
19 Follow up with customers
20 Greet customer
21 Close sale
22 Present product features and benefits to overcome customer objections
23 Show customer fashionable ways to accessorize garments
24 Process telephone orders for merchandise

DUTY B: Performing Sales-Related Activities

TASKS:
1 Open store or department
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of-sale cash register
4 Process cash or check sales transaction using optical scanning cash register
5 Process debit card sales transaction using electric cash register
6 Process debit card sales transaction using electronic point-of-sale cash register
7 Process debit card sales transaction using optical scanning cash register
8 Process store charge sales transaction using electric cash register
9 Process store charge sales transaction using electronic point-of-sale cash register
10 Process store charge sales transaction using optical scanning equipment attached to register
11 Process bank credit card sales transaction using electric cash register

12 Process bank credit card sales transaction using electronic point-of-sale cash register
13 Process bank credit card sales transaction using optical scanning equipment attached to register
14 Package customer's purchase
15 Gift wrap merchandise
16 Process customer complaint
17 Close out cash register
18 Close store or department
19 Measure customer for clothing
20 Restore fabric snags
21 Detect and report shoplifting
22 Detect and report counterfeit currency
23 Report employee pilferage
24 Detect and report fraudulent credit card
25 Detect and report fraudulent check
26 Process customer returns that are possible scams
27 Follow procedures for conduct during and after robbery
28 Prepare sales slip
29 Process sales and returns with discounts such as employee or senior citizen discounts
30 Arrange for donation of shopworn merchandise to local agencies
31 Write initial raincheck
32 Assist non-profit organizations with their sales
33 Call manufacturers to check on orders
34 Process customer's exchange
35 Process customer's cash refund for returned merchandise
36 Process charge credit for returned merchandise
37 Process lay-away sale
38 Process coupon sales transaction
39 Process gift certificate sales transaction
40 Process rain check sales transaction
41 Respond to customer complaint
42 Requisition supplies such as saleschecks/packaging supplies
43 Change cash register tape
44 Process installment credit sale
45 Secure customer credit information
46 Correct cash register errors

DUTY C: Performing Merchandising Duties

TASKS: 1 Process incoming merchandise
2 Return damaged merchandise
3 Prepare merchandise for stock or immediate store display
4 Code and date stock
5 Price merchandise using ticketing machine
6 Price merchandise using tie-on tickets
7 Price merchandise using pin tickets
8 Price merchandise using ticketing equipment with security tags
9 Price mechandise using gummed tags
10 Take price markups or markdowns as designated
11 Take progressive markdowns on shopworn or damaged goods

12 Stock merchandise on shelves, counters, tables, racks or in display cases
13 Straighten merchandise on shelves, counters, tables, racks or in display cases
14 Clean shelves, counters, tables, or display cases
15 Remove damaged, obsolete, or out-of-date merchandise from display or stock
16 Steam badly wrinkled clothing
17 Maintain alignment of racks
18 Maintain fitting rooms
19 Change price on merchandise
20 Take physical inventory of stock
21 Keep records of merchandise sold using ticket stubs

DUTY D: Preparing Merchandise Display

TASKS:
1 Dress mannequin
2 Accessorize display merchandise
3 Set up counter display
4 Set up manufacturer's display
5 Set up window display
6 Set up interior display
7 Set up end-of-aisle display
8 Set up display in display case
9 Set up table display
10 Dismantle merchandise display
11 Prepare point-of-sale sign or banner by hand
12 Prepare point-of-sale sign or banner using sign press
13 Set up advertised merchandise for sale
14 Clean and straighten up display
15 Assemble merchandise for display
16 Set up advertising signs

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Process telephone orders for merchandise
2 Arrange for the delivery of merchandise
3 Process customer's exchange
4 Process customer's cash refund for returned merchandise
5 Process customer's charge credit for returned merchandise
6 Process lay-away sale
7 Process special order for merchandise
8 Prepare gift certificate
9 Redeem food stamps or promotional coupon
10 Process back order for merchandise
11 Process store transfer of merchandise
12 Prepare bank deposit
13 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
14 Conduct on-going physical inventory
15 Conduct periodic physical inventory
16 Issue trading stamps
17 Redeem trading stamps
18 Process clothing alteration paperwork

19 Maintain a current clientele book or card file of customers
20 Issue credit memorandum for returned merchandise
21 Prepare cash drawer for daily business
22 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants and problems
2 Locate merchandise for customer
3 Show customer variety of styles
4 Show customer benefits of garment
5 Show customer signs of quality construction in apparel
6 Provide information to customer on the types of fabric used in garment
7 Provide information to customer on special finishes on garment fabric
8 Provide information to customer on any guarantees on clothing
9 Provide information on garment care to customer
10 Sell related products such as accessories
11 Sell alternative merchandise when desired product is not available
12 Suggest catalog sales when item is not carried in store
13 Inform customer of special promotions
14 Process mail orders for mechandise
15 Stimulate repeat business
16 Develop mailing lists
17 Follow up with customers
18 Sell larger quantities of merchandise
19 Greet customer
20 Close sale
21 Present product features and benefits to overcome customer objections
22 Mark garments for alteration
23 Show customer fashionable ways to accessorize garments
24 Process telephone orders for merchandise

DUTY B: Performing Sales-Related Activities

TASKS:
1 Open store or department
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of-sale cash register
4 Process cash or check sales transaction using optical scanning equipment attached to cash register
5 Process debit card sales transaction using electric cash register
6 Process debit card sales transaction using electronic point-of-sale cash register
7 Process debit card sales transaction using optical scanning equipment attached to cash register
8 Process bank credit card sales transaction using electric cash register
9 Process bank credit card sales transaction using electronic point-of-sale cash register
10 Process bank credit card sales transaction using optical scanning equipment attached to cash register
11 Process store charge sales transaction using electric cash register

12 Process store charge sales transaction using electronic point-of-sale cash register
13 Process store charge sales transaction using optical scanning equipment attached to cash register
14 Package customer's purchase
15 Gift wrap merchandise
16 Process customer complaint
17 Close out cash register
18 Close store or department
19 Detect and report shoplifting
20 Detect and report counterfeit currency
21 Report employee pilferage
22 Detect and report fraudulent credit card
23 Detect and report fraudulent check
24 Follow procedures for conduct during and after robbery
25 Prepare sales slip
26 Process sales and returns with discounts such as employee or senior citizen discounts
27 Call manufacturers to check on orders
28 Arrange for donation of shopworn merchandise to local agencies
29 Process foster children's saleschecks
30 Process childrens' homes saleschecks
31 Assist non-profit organizations with their sales
32 Process customer's exchange
33 Process customer's cash refund for returned merchandise
34 Process charge credit for returned merchandise
35 Process lay-away sale
36 Process gift certificate sales transaction
37 Process rain check sales transaction
38 Requisition supplies such as saleschecks/packaging supplies
39 Change cash register tape
40 Process customer returns that are possible scams
41 Write initial raincheck
42 Respond to customer complaint
43 Process installment credit sale
44 Secure customer credit information
45 Measure customer for clothing
46 Restore fabric snags
47 Process coupon sales transaction
48 Correct cash register errors

DUTY C: Performing Merchandising Duties

TASKS:
1 Process incoming merchandise
2 Return damaged merchandise
3 Prepare merchandise for stock or immediate store display
4 Code and date stock
5 Price merchandise using ticketing machine
6 Price merchandise using tie-on tickets
7 Price merchandise using pin tickets
8 Price merchandise using gummed tags
9 Price merchandise using ticketing equipment with security tags

10 Stock merchandise on shelves, counters, tables, racks or in display cases
11 Straighten merchandise on shelves, counters, tables, racks or in display cases
12 Clean shelves, counters, tables or display cases
13 Remove damaged, obsolete or out-of-date merchandise from display or stock
14 Steam badly wrinkled clothing
15 Take price markups or markdowns as designated by buyer
16 Maintain alignment of racks
17 Maintain fitting rooms
18 Take progressive markdowns on shopworn or damaged goods
19 Change price on merchandise
20 Take physical inventory of stock
21 Keep records of merchandise sold using ticket stubs

DUTY D: Preparing Merchandise Display

TASKS:
1 Assemble merchandise for display
2 Dress mannequin
3 Accessorize display merchandise
4 Set up counter display
5 Set up manufacturer's display
6 Set up window display
7 Set up interior display
8 Set up end-of-aisle display
9 Set up display in display case
10 Set up table display
11 Dismantle merchandise display
12 Prepare point-of-sale sign or banner by hand
13 Prepare point-of-sale sign or banner using sign press
14 Set up advertised merchandise for sale
15 Clean and straighten up display

Duty E: Performing Clerical-Related Activities

TASKS:
1 Process telephone orders for merchandise
2 Arrange for delivery of merchandise
3 Process customer's exchange
4 Process customer's cash refund for returned merchandise
5 Process customer's charge credit for returned merchandise
6 Process lay-away sale
7 Process special order for merchandise
8 Redeem food stamps or promotional coupon
9 Process back order for merchandise
10 Process store transfer of merchandise
11 Prepare bank deposit
12 Requisition supplies such as saleschecks, cash register tape and packaging supplies
13 Issue trading stamps
14 Redeem trading stamps
15 Conduct on-going physical inventory
16 Conduct periodic physical inventory
17 Prepare gift certificate

18 Process clothing alteration paperwork
19 Maintain a current clientele book or card file of customer
20 Issue credit memorandum for returned merchandise
21 Prepare cash drawer for daily business
22 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants and problems
2 Locate merchandise for customer
3 Show customer variety of styles
4 Show customer benefits of garment
5 Show customer signs of quality construction in apparel
6 Provide information to customer on the types of fabric used in garment
7 Provide information to customer on special finishes on garment fabric
8 Provide information to customer on any guarantees on clothing
9 Provide information on garment care to customer
10 Sell related products such as accessories
11 Sell alternative merchandise when desired product is not available
12 Sell larger quantities of merchandise
13 Show customer fashionable ways to accessorize garments
14 Inform customer of special promotions
15 Mark garments for alteration
16 Suggest catalog sales when item is not carried in store
17 Process mail orders for merchandise
18 Stimulate repeat business
19 Develop mailing lists
20 Follow up with customers
21 Greet customer
22 Close sale
23 Present product features and benefits to overcome customer objections
24 Process telephone orders for merchandise

DUTY B: Performing Sales-Related Activities

TASKS:
1 Open store or department
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of-sale cash register
4 Process cash or check sales transaction check using optical scanning equipment attached to cash register
5 Process debit card sales transaction using electric cash register
6 Process debit card sales transaction using electronic point-of-sale cash register
7 Process debit card sales transaction using optical scanning equipment attached to cash register
8 Process bank credit card sales transaction using electric cash register
9 Process bank credit card sales transaction using electronic point-of-sale cash register
10 Process bank credit card sales transaction using optical scanning equipment attached to cash register
11 Process store charge sales transaction using electric cash register

12 Process store charge sales transaction using electronic point-of-sale cash register
13 Process store charge transaction using optical scanning equipment attached to cash register
14 Package customer's purchase
15 Gift wrap merchandise
16 Process customer complaint
17 Close out cash register
18 Close store or department
19 Measure customer for clothing
20 Restore fabric snags
21 Detect and report shoplifting
22 Detect and report counterfeit currency
23 Report employee pilferage
24 Detect and report fraudulent credit card
25 Detect and report fraudulent check
26 Process customer returns that are possible scams
27 Follow procedures for conduct during and after robbery
28 Prepare sales slip
29 Process sales and returns with discounts such as employee or senior citizen discounts
30 Arrange for donation of shopworn merchandise to local agencies
31 Assist non-profit organizations with their sales
32 Call manufacturers to check on orders
33 Change cash register tape
34 Write initial raincheck
35 Process customer's exchange
36 Process cutomer's cash refund for returned merchandise
37 Process charge credit for returned merchandise
38 Process lay-away sale
39 Process gift certificate sales transaction
40 Process rain check sales transaction
41 Respond to customer complaint
42 Requisition supplies such as saleschecks/packaging supplies
43 Process installment credit sales
44 Secure customer credit information
45 Process coupon sales transaction
46 Correct cash register errors

DUTY C: Performing Merchandising Duties

TASKS:
1 Process incoming merchandise
2 Return damaged merchandise
3 Prepare merchandise for stocking or immediate store display
4 Code and date stock
5 Price merchandise using ticketing machine
6 Price merchandise using tie-on tickets
7 Price merchandise using ticketing equipment with security tags
8 Price merchandise using gummed tags
9 Price merchandise using pin tickets
10 Take price markups or markdowns as designated
11 Stock merchandise on shelves, counters, tables, racks or in display cases

12 Straighten merchandise on shelves, counters, tables, racks or in display cases
13 Clean shelves, counters, tables or display cases
14 Remove damaged, obsolete, or out-of-date merchandise from display or stock
15 Steam badly wrinkled clothing
16 Maintain alignment of racks
17 Change price on merchandise
18 Take physical inventory of stock
19 Keep records of merchandise sold using ticket stubs
20 Maintain fitting rooms
21 Take progressive markdowns on shopworn or damaged goods

DUTY D: Preparing Merchandise Display

TASKS:
1 Assemble merchandise for display
2 Dress mannequin
3 Accessorize display merchandise
4 Set up counter display
5 Set up manufacturer's display
6 Set up window display
7 Set up interior display
8 Set up end-of-aisle display
9 Set up display in display case
10 Set up table display
11 Dismantle merchandise display
12 Prepare point-of-sale sign or banner by hand
13 Prepare point-of-sale sign or banner using sign press
14 Set up advertised merchandise for sale
15 Clean and straighten up display

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Process telephone orders for merchandise
2 Process clothing alteration paperwork
3 Arrange for delivery of merchandise
4 Process customer's exchange
5 Process customer's cash refund for returned merchandise
6 Process customer's charge credit for returned merchandise
7 Process lay-away sale
8 Process special order for merchandise
9 Prepare gift certificate
10 Redeem food stamp or promotional coupon
11 Process back order for merchandise
12 Process store transfer of merchandise
13 Prepare bank deposit
14 Maintain a current clientele book or card file of customers
15 Requisition supplies such as saleschecks, cash register tapes, and packaging supplies
16 Issue trading stamps
17 Redeem trading stamps
18 Conduct on-going physical inventory
19 Conduct periodic physical inventory
20 Issue credit memorandum for returned merchandise

21 Prepare cash drawer for daily business
22 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

SALESPERSON, AUTOMOBILE ACCESSORIES

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants and problems
2 Locate automotive accessories on selling floor
3 Locate automotive accessories in catalogs
4 Locate automotive accessories using microfiche system
5 Sell merchandise related to automotive electrical system
6 Sell merchandise related to automotive carburetion and fuel systems
7 Sell merchandise related to automotive heating, cooling, exhaust and emission systems
8 Sell merchandise related to automotive suspension, steering and braking systems
9 Sell automotive replacement merchandise such as belts, filters and windshield wiper blades
10 Sell merchandise to maintain the interior and exterior appearance of vehicle
11 Sell automotive-related merchandise such as car top carriers, trailers, jacks and tools
12 Suggest catalog sales when item is not carried in store
13 Stimulate repeat business
14 Develop mailing lists
15 Follow up with customers
16 Greet customer
17 Close sale
18 Determine availability of merchandise using computer terminal
19 Locate merchandise for customer
20 Domonstrate product use and care
21 Present product features and benefits to overcome customer objections
22 Inform customer of special promotions
23 Process telephone orders for merchandise

DUTY B: Performing Sales-Related Activities

TASKS:
1 Open store or department
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of-sale cash register
4 Process cash or check sales transaction using optical scanning equipment attached to cash register
5 Process debit card sales transaction using electric cash register
6 Process debit card sales transaction using electronic point-of-sale cash register
7 Process debit card sales transaction using optical scanning equipment attached to cash register
8 Process bank credit card sales transaction using electric cash register
9 Process bank credit card sales transaction using electronic point-of-sale cash register
10 Process bank credit card sales transaction using optical scanning equipment attached to cash register

11 Process store charge sales transaction using electric cash register
12 Process store charge sales transaction using electronic point-of-sale cash register
13 Process store sales transaction using optical scanning equipment attached to cash register
14 Calculate cash discounts
15 Secure customer credit information
16 Process customer complaint
17 Close out cash register
18 Close store or department
19 Detect and report shoplifting
20 Detect and report counterfeit currency
21 Report employee pilferage
22 Detect and report fraudulent credit card
23 Detect and report fraudulent check
24 Process customer returns that are possible scams
25 Follow procedures for conduct during and after robbery
26 Prepare sales slip
27 Process sales and returns with discounts such as employee or senior citizen discounts
28 Write initial raincheck
29 Call manufacturer to check on order
30 Change cash register tape
31 Process installment credit sale
32 Secure customer credit information
33 Correct cash register errors

DUTY C: Performing Merchandising Duties

TASKS:
1 Process incoming merchandise
2 Return damaged merchandise
3 Code and date stock
4 Prepare merchandise for stock or immediate store display
5 Price merchandise using price stamper
6 Price merchandise using ticketing machine
7 Price merchandise using gummed tags
8 Price merchandise using ticketing equipment with security tags
9 Take price markups or markdowns as designated
10 Take progressive markdowns on shopworn or damaged goods
11 Place price cards on shelves
12 Remove damaged, obsolete or out-of-date merchandise from display or stock
13 Stock merchandise on shelves, counters, tables, racks or in display cases
14 Clean shelves, counters, tables, or display case
15 Straighten merchandise on shelves, counters, tables, racks or in display cases

DUTY D: Preparing Merchandise Display

TASKS:
1 Assemble merchandise for display
2 Set up counter display

3 Set up manufacturer's display
4 Set up window display
5 Set up interior display
6 Set up end-of-aisle display
7 Set up display in display case
8 Dismantle merchandise display
9 Prepare point-of-sale sign or banner by hand
10 Prepare point-of-sale sign or banner using sign press
11 Set up advertised merchandise for sale
13 Set up table display
14 Clean and straighten up display

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Process telephone orders for merchandise
2 Arrange for delivery of merchandise
3 Process customer's exchange
4 Process customer's cash refund for returned merchandise
5 Process customer's charge credit for returned merchandise
6 Process lay-away sale
7 Process special order for merchandise
8 Redeem food stamps or promotional coupon
9 Process back order for merchandise
10 Process store transfer of merchandise
11 Prepare bank deposit
12 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
13 Conduct on-going physical inventory
14 Conduct periodic physical inventory
15 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Performing Sales-Related Activities

TASKS:
1 Package customer's purchase
2 Process customer complaint
3 Detect and report shoplifting
4 Report employee pilferage
5 Follow procedures for conduct during and after robbery
6 Secure merchandise while in storage area or stockroom

DUTY B: Receiving and Storing Incoming Merchandise

TASKS:
1 Assist carrier unload (off-load) merchandise
2 Check invoice against purchase order
3 Check number of cartons against bill of lading, freight bill or manifest
4 Prepare overage, shortage and discrepancy (OSD) report
5 Inspect incoming cartons or containers for damage
6 Deliver incoming shipment to storage or work area using hand truck
7 Unpack incoming shipment
8 Check unpacked merchandise against invoice or packing slip
9 Inspect unpacked merchandise for damage
10 Sort unpacked goods according to identification codes
11 Store unpacked merchandise in bins, racks, or shelves in stockroom
12 Clean stockroom

DUTY C: Performing Merchandising Duties

TASKS:
1 Pull and assemble merchandise for sales floor
2 Code and date stock
3 Price merchandise using ticketing machine
4 Price merchandise using price stamper
5 Price merchandise using gummed tags
6 Price merchandise using tie-on tickets
7 Price merchandise using pin tickets
8 Price merchandise using ticketing equipment with security tags
9 Place price cards on shelves
10 Take price markups or markdowns as designated
11 Take progressive markdowns on shopworn or damaged goods
12 Deliver marked merchandise to sales floor for display
13 Remove damaged, obsolete, or out-of-date merchandise from display or stock
14 Return damaged merchandise
15 Stock merchandise on shelves, counters, tables, racks or in display cases
16 Straighten merchandise on shelves, counters, tables, racks or in display cases
17 Clean shelves, counters, tables, or display cases
18 Rotate dated stock on shelves
19 Check accuracy of stocked shelves
20 Prepare merchandise for stock or immediate store display

DUTY D: Preparing Merchandise Display

TASKS:
1 Set up counter display
2 Set up manufacturer's display
3 Set up end-of-aisle display
4 Set up table display
5 Set up display in display case
6 Set up window display
7 Set up advertising signs
8 Dismantle merchandise display
9 Set up advertised merchandise for sale

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Process store transfer of merchandise
2 Prepare stock order forms
3 Prepare stock record cards and bin tickets
4 File stock record cards
5 Conduct on-going physical inventory
6 Conduct periodic physical inventory
7 Process special order for merchandise
8 Process store transfer of merchandise

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

CASHIER I

DUTY A: Performing Sales-Related Activities

TASKS:
1 Process customer complaint
2 Detect and report counterfeit currency
3 Report employee pilferage
4 Detect and report fraudulent credit card
5 Detect and report fraudulent check
6 Follow procedures for conduct during and after robbery
7 Detect and report shoplifting
8 Change cash register tape
9 Process gift certificate sales transaction
10 Close out cash register

DUTY B: Performing Clerical-Related Activities

1 Cash checks
2 Prepare bank deposit
3 Redeem food stamps or promotional coupons
4 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
5 Issue credit memorandum for returned merchandise
6 Prepare cash drawer for daily business
7 Balance cash drawer at end of day

DUTY C: Performing Accounting-Related Activities

TASKS:
1 Process cash payment of account using bookkeeping machine
2 Process cash payment of account using computerized system
3 Process accounts paid by check using bookkeeping machine
4 Process account as paid by check using computerized system
5 Process account paid by credit card using bookkeeping machine
6 Process account paid by credit card using computerized system
7 Process pre-payment of account using bookkeeping machine
8 Process pre-payment of account using computerized system
9 Process vouchers for payment of company expenditures manually
10 Process vouchers for payment of company expenditures using bookkeeping machine
11 Process vouchers for payment of company expenditures using computerized system
12 Reconcile bank statement
13 Prepare collection and disbursement reports manually
14 Prepare collection and disbursement reports using bookkeeping machine
15 Prepare collection and disbursement reports using computerized system
16 Post customer's charges using bookkeeping machine
17 Post customer's charges using computerized system
18 Balance daily debits and credits to accounts

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants, and problems
2 Locate merchandise for customer
3 Sell tickets for events using ticket dispensing machine
4 Sell tickets for events using computerized system
5 Sell gift certificates
6 Provide information on events or merchandise such as quality, special features, benefits and guarantees
7 Sell tickets for alternative events or alternative merchandise
8 Process mail orders for tickets

DUTY B: Performing Sales-Related Activities

TASKS:
1 Process cash or check sales transaction using electric cash register
2 Process cash or check sales transaction using electronic point-of-sale cash register
3 Process debit card sales transaction using electric cash register
4 Process debit card sales transaction using electronic point-of-sale cash register
5 Process bank credit card sales transaction using electric cash register
6 Process bank credit card sales transaction using electronic point-of-sale cash register
7 Process customer complaint
8 Close out cash register
9 Detect and report shoplifting
10 Detect and report counterfeit currency
11 Report employee pilferage
12 Detect and report fraudulent credit card
13 Detect and report fraudulent check
14 Follow procedures for conduct during and after robbery
15 Process customer through cafeteria checkout
16 Process sales and returns with discounts such as employee or senior citizen discounts
17 Process store charge sales transaction using electric cash register
18 Process store charge sales transaction using electronic point-of-sale cash register
19 Change cash register tape
20 Process customer returns that are possible scams
21 Process customer's exchange
22 Process customer's cash refund for returned merchandise
23 Process charge credit for returned merchandise
24 Process gift certificate sales transaction
25 Process rain check sales transaction

DUTY C: Performing Clerical-Related Activities

TASKS:
1 Prepare cash drawer for daily business

2 Process payments on accounts receivable using computerized system
3 Issue credit memorandum for returned merchandise
4 Redeem food stamps or promotional coupon
5 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
6 Balance cash drawer at end of day
7 Prepare bank deposit
8 Cash checks

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

CASHIER/CHECKER

DUTY A: Selling Merchandise

TASKS:
1 Determine customer needs, wants and problems
2 Locate merchandise for customer
3 Provide information on events or merchandise such as quality, special features, benefits and guarantees
4 Sell alternative merchandise when desired product is not available
5 Stimulate repeat business
6 Process mail orders for tickets
7 Process mail orders for merchandise
8 Inform customers of special promotions

DUTY B: Performing Sales-Related Activities

TASKS:
1 Process cash or check sales transaction using electric cash register
2 Process cash or check sales tranaction using electronic point-of-sale cash register
3 Process cash or check sales transaction using optical scanning equipment attached to cash register
4 Process debit card sales transaction using electric cash register
5 Process debit card sales tranaction using electronic point-of-sale cash register
6 Process debit card sales tranaction using optical scanning equipment attached to cash register
7 Process bank credit card sales transaction using electric cash register
8 Process bank credit card sales transaction using electronic point-of-sale cash register
9 Process bank credit card sales transaction using optical scanning equipment attached to cash register
10 Package customer's purchase
11 Process customer complaint
12 Close out cash register
13 Detect and report shoplifting
14 Detect and report counterfeit currency
15 Report employee pilferage
16 Detect and report fraudulent credit card
17 Detect and report fraudulent check
18 Process customer returns that are possible scams
19 Follow procedures for conduct during and after robbery
20 Weigh items on electronic scale
21 Correct cash register errors
22 Prepare sales slip
23 Process sales and returns with discounts such as employee or senior citizen discounts
24 Process store charge sales transaction using electric cash register
25 Process store charge sales transaction using electronic point-of-sale cash register
26 Gift wrap merchandise
27 Change cash register tape

28 Process gift certificate sales transaction
29 Process rain check sales transaction

DUTY C: Performing Merchandising Duties

TASKS:
1 Process incoming merchandise
2 Return damaged merchandise
3 Prepare merchandise for stock or immediate store display
4 Code and date stock
5 Price merchandise using ticketing machine
6 Price merchandise using price stamper
7 Price merchandise using gummed tags
8 Price merchandise using ticketing equipment with security tags
9 Remove damaged, obsolete, or out-of-date merchandise from display or stock
10 Stock merchandise on shelves, counters, tables, racks or in display cases
11 Place price cards on shelves
12 Straighten merchandise on shelves, counters, tables, racks or in display cases
13 Clean shelves, counters, tables, or display cases
14 Take price markups or markdowns as designated
15 Take progresssive markdowns on shopworn or damaged goods

DUTY D: Preparing Merchandise Display

TASKS:
1 Assemble merchandise for display
2 Set up counter display
3 Set up manufacturer's display
4 Set up window display
5 Set up interior display
6 Set up end-of-aisle display
7 Set up display in display case
8 Set up table display
9 Dismantle merchandise display
10 Set up advertised merchandise for sale

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Prepare cash drawer for daily business
2 Redeem food stamps or promotional coupons
3 Requisition supplies such as saleschecks, cash register tapes and packaging supplies
4 Cash checks
5 Issue trading stamps
6 Redeem trading stamps
7 Balance cash drawer at end of day
8 Prepare bank deposit

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

SERVICE ORIENTED MARKETING CLUSTER

Teller

*Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

TE = Teller

PLANNING AND ORGANIZING

		TE
1	Obtain strapped currency to supply cash buggy for day's transactions	X
2	Obtain rolled coin to supply cash buggy for day's transactions	X
3	Prepare strapped currency for placement in the cash drawer	X
4	Arrange working currency in cash drawer	X
5	Arrange coin in coin tray for day's transactions	X
6	Arrange reserve currency and coin in storage drawer	X
7	Organize teller's stamps for ease in using	X

PROCESSING CUSTOMER TRANSACTIONS

		TE
1	Process Christmas Club payments	X
2	Process installment loan payments	X
3	Advance cash on bank credit cards	X
4	Cash single check	X
5	Cash batch of checks	X
6	Certify checks	X
7	Cash certified checks	X
8	Issue U. S. Government savings bond	X
9	Cash U. S. Government savings bond	X
10	Process bond coupons for cash	X
11	Process bond coupons for deposit	X
12	Process deposits from night depository	X
13	Process cash deposits	X
14	Process check deposits	X
15	Process certified checks	X
16	Process combination cash and check deposits	X
17	Process less-cash deposits	X
18	Enter amount of interest in savings passbook	X
19	Process savings withdrawal	X
20	Issue certificates of deposit	X
21	Redeem certificates of deposit	X
22	Issue cashier's check	X
23	Issue bank draft	X
24	Issue money order	X
25	Issue traveler's checks	X
26	Cash traveler's checks	X
27	Process coin or currency change orders	X
28	Fill payroll requests	X
29	Answer customer inquiries for information such as account balance	X
30	Issue foreign currency	X
31	Process foreign currency	X
32	Enter transactions in teller machine	X
33	Issue deposit/payment receipt using teller machine	X
34	Accept federal tax payments	X
35	Accept utility payments	X
36	Accept property tax payments	X
37	Accept food stamp deposits	X
38	Obtain information from microfiche or microfilm	X
39	Transfer funds between accounts by telephone	X

PROCESSING MONEY

	TE
1 Process excess currency and coin	X
2 Process counterfeit currency	X
3 Process mutilated and badly worn currency	X
4 Count and wrap coin by hand	X
5 Count and wrap coin using coin counter	X
6 Sort and stack coins	X
7 Sort and stack currency	X
8 Strap currency	X
9 Count loose coin	X
10 Count rolled coin	X
11 Count boxed coin	X
12 Count loose currency	X
13 Count stacked currency	X
14 Count strapped currency	X
15 Verify strapped currency amount	X

PROMOTING CUSTOMER RELATIONS

	TE
1 Greet customer	X
2 Dismiss customer	X
3 Cross-sell financial services	X
4 Explain policies and procedures to customers	X

PERFORMING CLERICAL-RELATED ACTIVITIES

	TE
1 Prepare cash drawer for daily business	X
2 Duplicate materials using photocopying machine	X
3 Process outgoing mail	X
4 Process incoming mail	X
5 File materials using numeric filing system	X
6 Process incoming calls on telephone	X
7 Process outgoing calls on telephone	X
8 Clean and straighten up own work area	X
9 Equip teller window with banking forms and supplies	X
10 Process check order or reorder	X
11 Close account	X
12 Place stop payment on check	X
13 Process safe deposit box rental fee	X
14 Process address change on customer account	X
15 Place hold on customer account	X
16 Prepare deposit slip for customer	X
17 Prepare cash-in and cash-out tickets	X
18 Buy money from vault	X
19 Sell money to vault	X
20 Buy money from other tellers/cashiers	X
21 Sell money to other tellers/cashiers	X
22 Balance teller window using adding machine or calculator	X
23 Balance teller window using teller machine	X
24 Type bank forms	X
25 Type envelopes	X
26 Follow procedures for conduct during and after robbery	X

		TE
27	Follow procedures for safekeeping money in cash drawer/tellers window	X
28	Balance cash drawer at end of day	X

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in to accomplish task
11 Prepare written comm
12 Utilize keyboarding s
13 Utilize computer skil

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS: 1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS: 1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Planning and Organizing

TASKS:
1 Obtain strapped currency to supply cash buggy for day's transactions
2 Obtain rolled coin to supply cash buggy for day's transactions
3 Prepare strapped currency for placement in the cash drawer
4 Arrange working currency in cash drawer
5 Arrange coin in coin tray for day's transactions
6 Arrange reserve currency and coin in storage drawer
7 Organize teller's stamps for ease in using

DUTY B: Processing Customer Transactions

TASKS:
1 Process Christmas Club payments
2 Process installment loan payments
3 Advance cash on bank credit cards
4 Cash single check
5 Cash batch of checks
6 Certify checks
7 Cash certified checks
8 Issue U. S. Government savings bond
9 Cash U. S. Government savings bond
10 Process bond coupons for cash
11 Process bond coupons for deposit
12 Process deposits from night depository
13 Process cash deposits
14 Process check deposits
15 Process certified checks
16 Process combination cash and check deposits
17 Process less-cash deposits
18 Enter amount of interest in savings passbook
19 Process savings withdrawal
20 Issue certificates of deposit
21 Redeem certificates of deposit
22 Issue cashier's check
23 Issue bank draft
24 Issue money order
25 Issue traveler's checks
26 Cash traveler's checks
27 Process coin or currency change orders
28 Fill payroll requests
29 Answer customer inquiries for information such as account balance
30 Issue foreign currency
31 Process foreign currency
32 Enter transactions in teller machine
33 Issue deposit/payment receipt using teller machine
34 Accept federal tax payments
35 Accept utility payments
36 Accept property tax payments
37 Accept food stamp deposits
38 Obtain information from microfiche or microfilm
39 Transfer funds between accounts by telephone

DUTY C: Processing Money

TASKS:
1 Process excess currency and coin
2 Process counterfeit currency
3 Process mutilated and badly worn currency
4 Count and wrap coin by hand
5 Count and wrap coin using coin counter
6 Sort and stack coins
7 Sort and stack currency
8 Strap currency
9 Count loose coin
10 Count rolled coin
11 Count boxed coin
12 Count loose currency
13 Count stacked currency
14 Count strapped currency
15 Verify strapped currency amount

DUTY D: Promoting Customer Relations

TASKS:
1 Greet customer
2 Dismiss customer
3 Cross-sell financial services
4 Explain policies and procedures to customers

DUTY E: Performing Clerical-Related Activities

TASKS:
1 Prepare cash drawer for daily business
2 Duplicate materials using photocopying machine
3 Process outgoing mail
4 Process incoming mail
5 File materials using numeric filing system
6 Process incoming calls on telephone
7 Process outgoing calls on telephone
8 Clean and straighten up own work area
9 Equip teller window with banking forms and supplies
10 Process check order or reorder
11 Close account
12 Place stop payment on check
13 Process safe deposit box rental fee
14 Process address change on customer account
15 Place hold on customer account
16 Prepare deposit slip for customer
17 Prepare cash-in and cash-out tickets
18 Buy money from vault
19 Sell money to vault
20 Buy money from other tellers/cashiers
21 Sell money to other tellers/cashiers
22 Balance teller window using adding machine or calculator
23 Balance teller window using teller machine
24 Type bank forms
25 Type envelopes
26 Follow procedures for conduct during and after robbery

27 Follow procedures for safekeeping money in cash drawer/ tellers window
28 Balance cash drawer at end of day

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

Education For Employment Task Lists

Illinois State Board of Education

Adult Vocational and Technical Education

BUSINESS, MARKETING AND MANAGEMENT OCCUPATIONS

BUSINESS OWNERSHIP / MANAGEMENT CLUSTER

Small Business Owner / Operator

* Employability Skills

*Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

BUSINESS OWNERSHIP/MANAGEMENT CLUSTER MATRIX

SB = Small Business Owner/Operator

ESTABLISHING A SMALL BUSINESS

		SB
1	Obtain technical assistance from professionals such as attorney's, insurance agents and management consultants	X
2	Conduct market survey	X
3	Complete location feasibility study	X
4	Select business location	X
5	Determine legal form of organization	X
6	Prepare loan application package	X
7	Obtain venture capital	X
8	Follow steps to file ownership for business	X
9	Comply with government regulations	X
10	Obtain insurance such as fire, liability and worker's compensation	X

PLANNING AND BUDGETING

		SB
1	Prepare business plan	X
2	Plan goals and objectives for business	X
3	Establish and diagram the business organizational structure	X
4	Establish operating policies and procedures	X
5	Develop action plans to meet specific goals	X
6	Develop business/marketing plan	X
7	Develop sales forecast	X
8	Prepare operating budget	X
9	Develop expense-control plan	X
10	Evaluate business performance compared to action plan	X
11	Analyze operating results in relation to budget	X
12	Take corrective steps to bring performance in line with action plan and budget	X

MANAGING BUSINESS OPERATIONS

		SB
1	Design business layout	X
2	Determine equipment and supplies needed	X
3	Purchase equipment and supplies	X
4	Establish policies and procedures for business security	X
5	Follow established procedures for handling theft	X
6	Follow established security procedures for opening and closing the business	X
7	Establish safety program	X
8	Follow procedures in handling employee or customer accidents	X
9	Establish maintenance and housekeeping program	X
10	Negotiate service and maintenance contracts	X
11	Establish fire prevention program	X
12	Follow procedures for handling fires	X
13	Recognize and correct hazardous conditions	X
14	Establish customer service policies and procedures	X
15	Evaluate business operations	X

MANAGING HUMAN RESOURCES

	SB
1 Determine personnel needs	X
2 Prepare detailed job description for each position	X
3 Develop hiring policies and procedures	X
4 Apply hiring policies and procedures	X
5 Comply with state and federal employment laws for hiring	X
6 Recruit employees	X
7 Select job applicants for interviews	X
8 Conduct job interview	X
9 Select employees	X
10 Conduct employee orientation	X
11 Train employees	X
12 Schedule employees	X
13 Delegate responsibility and authority to employees	X
14 Counsel employees	X
15 Establish criteria and procedures for evaluating employees	X
16 Evaluate employee performance	X
17 Discipline employees	X
18 Discharge employees	X
19 Establish system of salaries, commissions, bonuses and quotas	X

EXTENDING CREDIT

	SB
1 Establish credit policies and procedures	X
2 Explain credit policies and procedures to employees and customers	X
3 Secure customer credit information	X
4 Obtain credit reference information from credit bureau	X
5 Supply credit reference information to credit bureau	X
6 Age customer accounts	X
7 Approve charges to customer accounts	X
8 Discuss delinquent accounts with customers	X
9 Initiate legal action on delinquent accounts	X

PERFORMING MERCHANDISING DUTIES

	SB
1 Prepare merchandise plan	X
2 Implement seasonal merchandise plan	X
3 Determine inventory on hand	X
4 Prepare open-to-buy	X
5 Select suppliers	X
6 Order merchandise	X
7 Forecast merchandise reorders	X
8 Process incoming merchandise	X
9 Return damaged merchandise	X
10 Plan merchandise storage space	X
11 Prepare merchandise for stock or immediate store display	X
12 Code and date stock	X
13 Establish pricing policies	X
14 Price merchandise using ticketing machine	X
15 Price merchandise using price stamper	X
16 Price merchandise using gummed tags	X
17 Price merchandise using tie-on tickets	X
18 Price merchandise using ticketing equipment with security tags	X
19 Price merchandise using pin tickets	X

		SB
20	Remove damaged, obsolete, or out-of-date merchandise from display or stock	X
21	Stock merchandise on shelves, counters, tables, racks or in display cases	X
22	Place price cards on shelves	X
23	Straighten merchandise on shelves, counters, tables, racks or in display cases	X
24	Clean shelves, counters, tables or display cases	X
25	Rotate dated stock on shelves	X
26	Establish inventory control program	X
27	Conduct periodic physical inventory	X
28	Conduct on-going physical inventory	X
29	Establish price markups and markdowns for merchandise or services	X
30	Take price markups or markdowns	X
31	Take progressive markdowns on shopworn or damaged goods	X
32	Sign advertised merchandise with sale signs	X
33	Set up advertised merchandise for sale	X
34	Assemble merchandise for display	X
35	Set up merchandise displays	X
36	Coordinate merchandise displays with advertised merchandise	X
37	Clean, tidy up, and repair displays	X
38	Dismantle displays	X
39	Prepare point-of-sale sign or banner by hand	X
40	Prepare point-of-sale sign or banner using a sign press	X
41	Select merchandise to be put on sale	X

ADVERTISING AND SALES PROMOTIONS

		SB
1	Establish advertising/promotional budget	X
2	Prepare advertising/promotional plan	X
3	Prepare advertising calendar	X
4	Determine target market	X
5	Select promotional products, merchandise, or services	X
6	Select advertising media	X
7	Develop print advertising copy	X
8	Proof print advertising copy	X
9	Develop radio advertisement	X
10	Develop television advertisement	X
11	Develop direct mail advertisement	X
12	Develop transit advertisement	X
13	Select advertising agency	X
14	Evaluate and interpret the results of advertising	X
15	Provide merchandise demonstrations	X
16	Provide free samples of merchandise	X
17	Hold promotional contest	X
18	Plan community relations	X

PERFORMING ACCOUNTING-RELATED ACTIVITIES

		SB
1	Establish manual payroll system	X
2	Establish computerized payroll system	X
3	Prepare payroll using manual payroll system	X
4	Input data to prepare payroll using computer system	X
5	Prepare payroll statements manually	X

		SB
6	Input data to prepare payroll statements using computer system	X
7	Prepare employee's form W-2 manually	X
8	Prepare employee's form W-2 using computer system	X
9	Prepare federal and state tax returns manually	X
10	Prepare federal and state tax returns using computer system	X
11	Record opening entries for new business using manual bookkeeping system	X
12	Input entries to open bookkeeping system for new business using computer system	X
13	Record accounting entries in manual bookkeeping system	X
14	Input accounting entries in computerized bookkeeping system	X
15	Issue monthly customer account statements	X
16	Write receipts for checks and cash sales	X
17	Record accounting entries using peg board	X
18	Prepare periodic reports and financial statements manually	X
19	Prepare periodic reports and financial statements using computer system	X
20	Write checks to pay bills for business	X
21	Print checks to pay bills for business using computer system	X
22	Establish manual inventory control system	X
23	Establish computerized inventory control system	X
24	Maintain manual inventory control system	X
25	Maintain computerized inventory control system	X
26	Prepare bank deposit	X
27	Reconcile bank statement	X
28	Analyze financial statements using financial ratios	X
29	Select bookkeeping/accounting service	X
30	Establish basic filing system	X
31	Maintain petty cash fund	X
32	Prepare cash flow statement	X

SELLING MERCHANDISE

		SB
1	Determine customer needs, wants, and problems	X
2	Determine availability of merchandise using computer terminal	X
3	Locate merchandise for customer	X
4	Demonstrate product use	X
5	Present product features and benefits to overcome customer objections	X
6	Locate and sell related products such as accessories	X
7	Locate and sell alternative merchandise when the desired product is not available	X
8	Suggest catalog sales when item is not carried in the store	X
9	Locate and sell larger quantities of merchandise	X
10	Stimulate repeat business	X
11	Develop mailing lists	X
12	Follow up with customers	X

PERFORMING SALES-RELATED ACTIVITIES

		SB
1	Open store	X
2	Process cash or check sales transaction using electric cash register	X

		SB
3	Process cash or check sales transaction using electronic point-of sales cash register	X
4	Process debit card sales transaction using electric cash register	X
5	Process debit card sales transaction using electronic point-of-sale cash register	X
6	Process charge card sales transaction using electric cash register	X
7	Process charge card sales transaction using electronic point-of-sale cash register	X
8	Package customer's purchase	X
9	Gift wrap merchandise	X
10	Process customer complaint	X
11	Close out cash register	X
12	Close store	X
13	Detect and report shoplifting	X
14	Detect and report counterfeit currency	X
15	Detect employee pilferage	X
16	Detect and report fraudulent credit card	X
17	Detect and report fraudulent check	X
18	Follow procedures for conduct during and after robbery	X
19	Prepare sales slip	X
20	Write initial raincheck	X
21	Process sales and returns with discounts such as employee or senior citizen discounts	X
22	Process customer returns that are possible scams	X
23	Call manufacturers to check on orders	X

PERFORMING CLERICAL-RELATED ACTIVITIES

		SB
1	Arrange for delivery of merchandise	X
2	Process customer's exchange	X
3	Process customer's cash refund for returned merchandise	X
4	Process customer's charge credit for returned merchandise	X
5	Process lay-away sale	X
6	Process special order for merchandise	X
7	Prepare gift certificate	X
8	Process gift certificate sales transaction	X
9	Process rain check sales transaction	X
10	Redeem promotional coupon	X
11	Process back order for merchandise	X
12	Change cash register tape	X
13	Issue trading stamps	X
14	Redeem trading stamps	X

EMPLOYABILITY SKILLS

DUTY A: Identifying Employment Opportunities

SKILLS:
1 Identify requirements for job
2 Investigate educational opportunities
3 Investigate occupational opportunities
4 Locate resources for finding employment
5 Confer with prospective employers
6 Identify job trends

DUTY B: Applying Employment Seeking Skills

SKILLS:
1 Locate job openings
2 Document skills and abilities (resume)
3 Prepare for interview
4 Participate in interview
5 Complete required tests
6 Complete required forms
7 Write application letter
8 Write follow-up letter
9 Write acceptance letter
10 Evaluate job offer
11 Evaluate job rejection

DUTY C: Interpreting Employment Capabilities

SKILLS:
1 Match interest to job area
2 Match aptitudes to job area
3 Verify abilities
4 Identify immediate work goal
5 Develop career plan

DUTY D: Demonstrating Appropriate Work Behavior

SKILLS:
1 Exhibit dependability
2 Demonstrate punctuality
3 Follow rules and regulations
4 Recognize the consequences of dishonesty
5 Complete assignments in accurate and timely manner
6 Control emotions
7 Assume responsibility for own decisions and actions
8 Exhibit pride and loyalty
9 Exhibit ability to handle pressures and tensions
10 Demonstrate ability to set priorities
11 Demonstrate problem-solving skills

DUTY E: Maintaining Safe and Healthy Environment

SKILLS:
1 Comply with safety and health rules
2 Select correct tools and equipment
3 Utilize equipment correctly

4 Use appropriate action during emergencies
5 Maintain clean and orderly work area
6 Demonstrate personal hygiene and cleanliness

DUTY F: Maintaining Business-Like Image

SKILLS: 1 Participate in company or agency orientation
2 Demonstrate knowledge of company or agency products and services
3 Exhibit positive behavior
4 Read current job-related publications
5 Support and promote employer's company image and purpose
6 Maintain appearance to comply with company standards

DUTY G: Maintaining Working Relationships with Others

SKILLS: 1 Work productively with others
2 Show empathy, respect and support for others
3 Demonstrate procedures and assist others when necessary
4 Recognize, analyze and solve or refer problems
5 Minimize occurrence of problems
6 Channel emotional reaction constructively

DUTY H: Communicating on the Job

SKILLS: 1 Read and comprehend written communications and information
2 Use correct grammar
3 Speak effectively with others
4 Use job-related terminology
5 Listen attentively
6 Write legibly
7 Use telephone etiquette
8 Follow written and oral directions
9 Ask questions
10 Locate information in order to accomplish task
11 Prepare written communication
12 Utilize keyboarding skills
13 Utilize computer skills

DUTY I: Adapting to Change

SKILLS: 1 Recognize need to change
2 Demonstrate willingness to learn
3 Demonstrate flexibility
4 Participate in continuing education
5 Seek work challenges
6 Adjust career goals/plan as needed

DUTY J: Understanding How a Business Works

SKILLS: 1 Recognize the role of business in the enterprise system
2 Identify general responsibilities of employees
3 Identify general responsibilities of management/employers
4 Investigate opportunities and options for business ownership
5 Identify planning processes needed to open a business
6 Participate in meetings

DUTY K: Performing Mathematical Skills

SKILLS: 1 Apply mathematics for problem solving
2 Add and subtract whole numbers, decimals and fractions
3 Multiply and divide whole numbers, decimals and fractions
4 Convert numbers between forms expressed as fractions, decimals and percents
5 Convert between standard American units of measure
6 Convert between standard American units and metric units

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.

DUTY A: Establishing a Small Business

TASKS:
1 Obtain technical assistance from professionals such as attorney's, insurance agents and management consultants
2 Conduct market survey
3 Complete location feasibility study
4 Select business location
5 Determine legal form of organization
6 Prepare loan application package
7 Obtain venture capital
8 Follow steps to file ownership for business
9 Comply with government regulations
10 Obtain insurance such as fire, liability and worker's compensation

DUTY B: Planning and Budgeting

TASKS:
1 Prepare business plan
2 Plan goals and objectives for business
3 Establish and diagram the business organizational structure
4 Establish operating policies and procedures
5 Develop action plans to meet specific goals
6 Develop business/marketing plan
7 Develop sales forecast
8 Prepare operating budget
9 Develop expense-control plan
10 Evaluate business performance compared to action plan
11 Analyze operating results in relation to budget
12 Take corrective steps to bring performance in line with action plan and budget

DUTY C: Managing Business Operations

TASKS:
1 Design business layout
2 Determine equipment and supplies needed
3 Purchase equipment and supplies
4 Establish policies and procedures for business security
5 Follow established procedures for handling theft
6 Follow established security procedures for opening and closing the business
7 Establish safety program
8 Follow procedures in handling employee or customer accidents
9 Establish maintenance and housekeeping program
10 Negotiate service and maintenance contracts
11 Establish fire prevention program
12 Follow procedures for handling fires
13 Recognize and correct hazardous conditions
14 Establish customer service policies and procedures
15 Evaluate business operations

DUTY D: Managing Human Resources

TASKS:
1 Determine personnel needs

2 Prepare detailed job description for each position
3 Develop hiring policies and procedures
4 Apply hiring policies and procedures
5 Comply with state and federal employment laws for hiring
6 Recruit employees
7 Select job applicants for interviews
8 Conduct job interview
9 Select employees
10 Conduct employee orientation
11 Train employees
12 Schedule employees
13 Delegate responsibility and authority to employees
14 Counsel employees
15 Establish criteria and procedures for evaluating employees
16 Evaluate employee performance
17 Discipline employees
18 Discharge employees
19 Establish system of salaries, commissions, bonuses and quotas

DUTY E: Extending Credit

TASKS:
1 Establish credit policies and procedures
2 Explain credit policies and procedures to employees and customers
3 Secure customer credit information
4 Obtain credit reference information from credit bureau
5 Supply credit reference information to credit bureau
6 Age customer accounts
7 Approve charges to customer accounts
8 Discuss delinquent accounts with customers
9 Initiate legal action on delinquent accounts

DUTY F: Performing Merchandising Duties

TASKS:
1 Prepare merchandise plan
2 Implement seasonal merchandise plan
3 Determine inventory on hand
4 Prepare open-to-buy
5 Select suppliers
6 Order merchandise
7 Forecast merchandise reorders
8 Process incoming merchandise
9 Return damaged merchandise
10 Plan merchandise storage space
11 Prepare perchandise for stock or immediate store display
12 Code and date stock
13 Establish pricing policies
14 Price merchandise using ticketing machine
15 Price merchandise using price stamper
16 Price merchandise using gummed tags
17 Price merchandise using tie-on tickets
18 Price merchandise using ticketing equipment with security tags

19 Price merchandise using pin tickets
20 Remove damaged, obsolete, or out-of-date merchandise from display or stock
21 Stock merchandise on shelves, counters, tables, racks or in display cases
22 Place price cards on shelves
23 Straighten merchandise on shelves, counters, tables, racks or in display cases
24 Clean shelves, counters, tables or display cases
25 Rotate dated stock on shelves
26 Establish inventory control program
27 Conduct periodic physical inventory
28 Conduct on-going physical inventory
29 Establish price markups and markdowns for merchandise or services
30 Take price markups or markdowns
31 Take progressive markdowns on shopworn or damaged goods
32 Sign advertised merchandise with sale signs
33 Set up advertised merchandise for sale
34 Assemble merchandise for display
35 Set up merchandise displays
36 Coordinate merchandise displays with advertised merchandise
37 Clean, tidy up, and repair displays
38 Dismantle displays
39 Prepare point-of-sale sign or banner by hand
40 Prepare point-of-sale sign or banner using a sign press
41 Select merchandise to be put on sale

DUTY G: Advertising and Sales Promotions

TASKS:
1 Establish advertising/promotional budget
2 Prepare advertising/promotional plan
3 Prepare advertising calendar
4 Determine target market
5 Select promotional products, merchandise or services
6 Select advertising media
7 Develop print advertising copy
8 Proof print advertising copy
9 Develop radio advertisement
10 Develop television advertisement
11 Develop direct mail advertisement
12 Develop transit advertisement
13 Select advertising agency
14 Evaluate and interpret the results of advertising
15 Provide merchandise demonstrations
16 Provide free samples of merchandise
17 Hold promotional contest
18 Plan community relations

DUTY H: Performing Accounting-Related Activities

TASKS:
1 Establish manual payroll system
2 Establish computerized payroll system
3 Prepare payroll using manual payroll system

4 Input data to prepare payroll using computer system
5 Prepare payroll statements manually
6 Input data to prepare payroll statements using computer system
7 Prepare employee's form W-2 manually
8 Prepare employee's form W-2 using computer system
9 Prepare federal and state tax returns manually
10 Prepare federal and state tax returns using computer system
11 Record opening entries for new business using manual bookkeeping system
12 Input entries to open bookkeeping system for new business using computer system
13 Record accounting entries in manual bookkeeping system
14 Input accounting entries in computerized bookkeeping system
15 Issue monthly customer account statements
16 Write receipts for checks and cash sales
17 Record accounting entries using peg board
18 Prepare periodic reports and financial statements manually
19 Prepare periodic reports and financial statements using computer system
20 Write checks to pay bills for business
21 Print checks to pay bills for business using computer system
22 Establish manual inventory control system
23 Establish computerized inventory control system
24 Maintain manual inventory control system
25 Maintain computerized inventory control system
26 Prepare bank deposit
27 Reconcile bank statement
28 Analyze financial statements using financial ratios
29 Select bookkeeping/accounting service
30 Establish basic filing system
31 Maintain petty cash fund
32 Prepare cash flow statement

DUTY I: Selling Merchandise

TASKS:
1 Determine customer needs, wants and problems
2 Determine availability of merchandise using computer terminal
3 Locate merchandise for customer
4 Demonstrate product use
5 Present product features and benefits to overcome customer objections
6 Locate and sell related products such as accessories
7 Locate and sell alternative merchandise when the desired product is not available
8 Suggest catalog sales when item is not carried in the store
9 Locate and sell larger quantities of merchandise
10 Stimulate repeat business
11 Develop mailing lists
12 Follow up with customers

DUTY J: Performing Sales-Related Activities

TASKS:
1 Open store
2 Process cash or check sales transaction using electric cash register
3 Process cash or check sales transaction using electronic point-of sales cash register
4 Process debit card sales transaction using electric cash register
5 Process debit card sales transaction using electronic point-of-sale cash register
6 Process charge card sales transaction using electric cash register
7 Process charge card sales transaction using electronic point-of-sale cash register
8 Package customer's purchase
9 Gift wrap merchandise
10 Process customer complaint
11 Close out cash register
12 Close store
13 Detect and report shoplifting
14 Detect and report counterfeit currency
15 Detect employee pilferage
16 Detect and report fraudulent credit card
17 Detect and report fraudulent check
18 Follow procedures for conduct during and after robbery
19 Prepare sales slip
20 Write initial raincheck
21 Process sales and returns with discounts such as employee or senior citizen discounts
22 Process customer returns that are possible scams
23 Call manufacturers to check on orders

DUTY K: Performing Clerical-Related Activities

TASKS:
1 Arrange for delivery of merchandise
2 Process customer's exchange
3 Process customer's cash refund for returned merchandise
4 Process customer's charge credit for returned merchandise
5 Process lay-away sale
6 Process special order for merchandise
7 Prepare gift certificate
8 Process gift certificate sales transaction
9 Process rain check sales transaction
10 Redeem promotional coupon
11 Process back order for merchandise
12 Change cash register tape
13 Issue trading stamps
14 Redeem trading stamps

Employability skills are a vital component of vocational education programs and should be incorporated into each occupational task list.